USER MANUAL

DIGITAL INFORMATION

DIAS

ARCHIVING SYSTEM

RELEASE 5.4

C&C Computers and Communications N.V.

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2. Introduction

2.1. Introducing DIAS

DIAS is the abbreviation of "**D**IGITAL **I**NFORMATION and **A**RCHIVING **S**YSTEM".

DIAS is a software system for document management and electronic archiving of all commercial documents, correspondence, e-mails, documentations, drawings and other sorts of documents. Wide-ranging possibilities, uncomplicated and **user-friendly interface**, large **integration** capacity with other applications and absolute **security** are key characteristics of DIAS.

DIAS is a modular application. Starting from the **Document Archiving** module you can extend the system with the **Workflow Management** module, to finish with a complete **Customer Relationship Management** (CRM) system. With the special designed features you will manage documents and files in the most efficient and time-saving way. Moreover DIAS has **connections** with Microsoft Office, Microsoft Outlook, digital fax software, various financial and ERP programs and other applications. When you have an adapted document scanner at your disposal, all printed documents can be captured to image-files which can be automatically stored in the archive.

Where formerly a physical document had to pass several departments for revision or approval, today the digital documents can follow a fixed flow from screen to screen. The different processes are managed and controlled by the workflow system.

Outgoing and incoming correspondence, scanned forms, e-mails, spreadsheets, Microsoft Office documents or multimedia files are all managed in files. Documents can be stored in **different graphic file formats** (among which TIFF, BMP, JPG and PDF). The textual contents of the document can be read (OCR, ICR, OMR, bar codes and patch codes) and the data can be transferred to other applications.

2.2. About the user manual

This guide describes the different functionalities of DIAS. With this manual we would like to answer all your questions regarding the use of our DIAS software. Should you not find the answer to you question in our manual, please do not hesitate to contact the DIAS helpdesk.

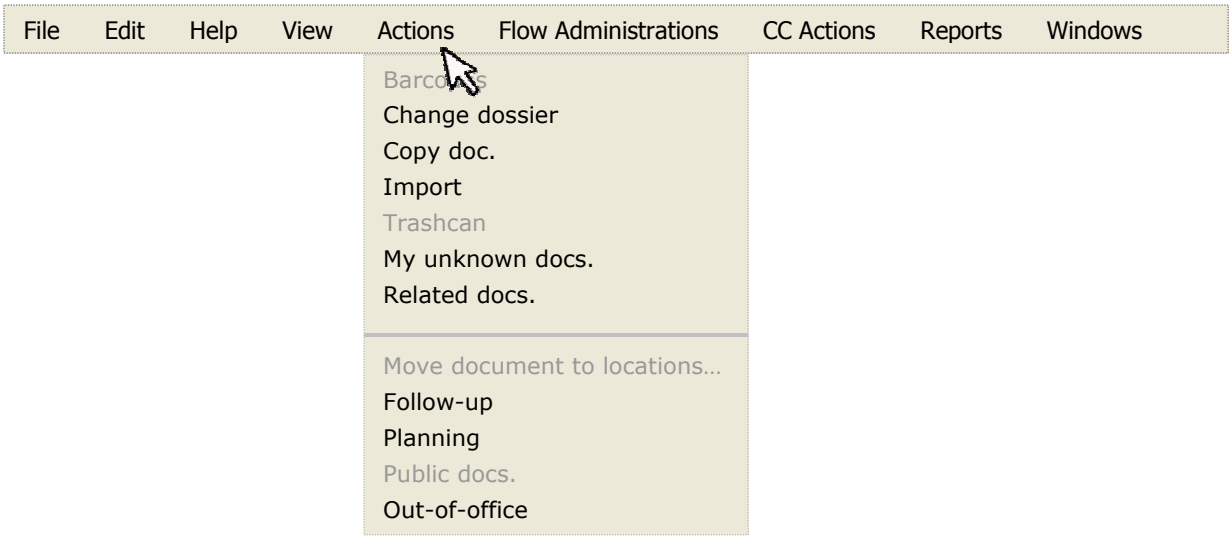
3. Work environment

DIAS is completely based on a Window environment. In this chapter we will introduce the menu bar and the toolbar. You will notice that several functionalities and buttons are used on multiple places.

3.1. Menu bar

In the menu bar you find all the functionalities that can be carried out with DIAS:

The different functions appear when you click on the menu name. The actions belonging to each menu are shown in a drop down list. To activate you click on the desired function.



Attention!

The composition of the drop down menu's can change depending on the menu which you open.

3.2. Toolbars

With the toolbars you easily get access to functions of DIAS.
When you pass the mouse pointer over a button you get a description of the action.

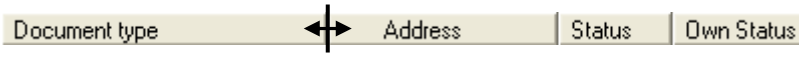
3.3. Fields

Everywhere where information can be entered, this happens with fields. You can recognise a field by the framed rectangle.

To place the cursor in the field you click with the left mouse button in the field. The number of characters which can be entered depends on the function of the field.
Often you will have to fill in several fields after each other. You can move the cursor quickly to the next field, by using the Tab-key.

3.4. Adjusting column size

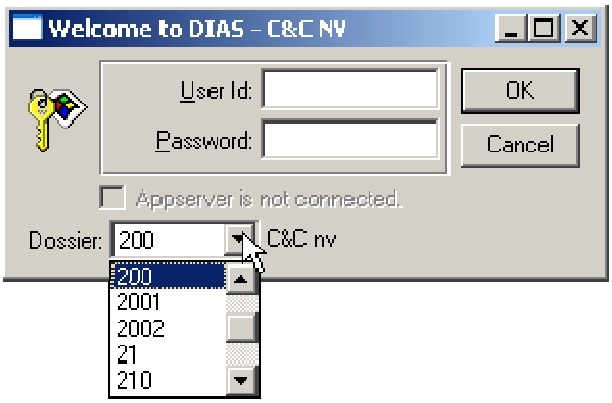
You can broaden or narrow the size of the columns of every table. Place the mouse pointer on the line that separates the two column titles. The appearance of your mouse pointer will change into a double arrow. Keep pressing the left mouse button and drag the pointer to the left or to the right in order to broaden or narrow the column on the left side of the cursor.



4. Starting with DIAS

4.1. Opening menu

When logging in on DIAS the following window will appear:



- Fill in your user name and password.
- The menu "Dossier" indicates the accounting or administrative file you wish to open. DIAS manages documents per file; each document can only belong to one administrative file and only people who have the necessary authorization can see the documents belonging to this file. The standard file is shown but you can select one of the other files in the list.
- Click "OK" to start DIAS.

4.2. Start menu

When you're logged-in the DIAS start menu will appear on your screen.
Depending on the user rights, the DIAS start menu can differ.

Start menu DIAS Administrator:

The Administrator is the manager of DIAS. This person has all the user rights. He / she can view all types of documents, remove documents, create new users, remove users or determine user rights. Usually there is only 1 Administrator.

Start menu DIAS User:

Depending on your user rights some of the pictograms might not be activated on your DIAS start menu.

Overview pictograms:

Document management: overview of the documents in the archive and workflow

Address management: database of contacts to which the documents are related.

Follow up: telephone calls and other events (visit reports / internal notes) that have no related documents.

Planning: agenda to manage tasks and appointments

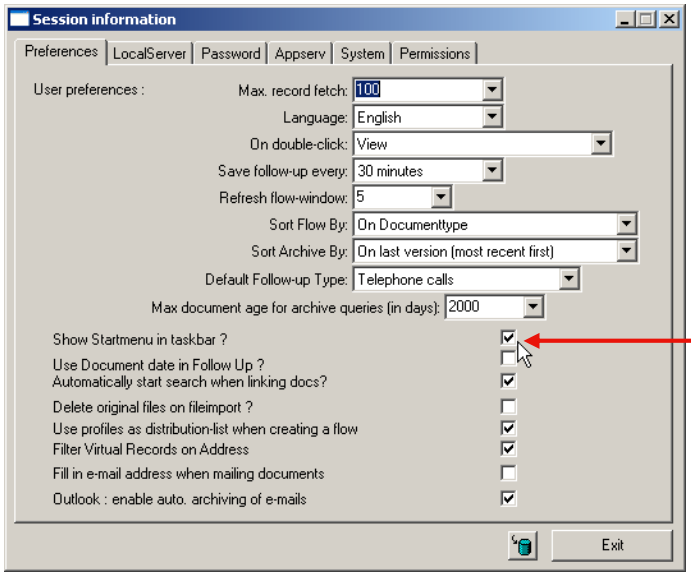
Administrator's menu: opens the DIAS main menu to set up a.o. system parameters (only accessible by the Administrator)

Session information: set up of a.o. preferences and password.

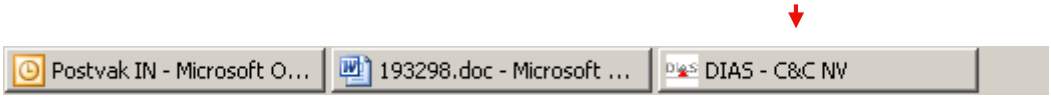
DIAS-menu: access to:
- User-defined records
- Countries and ZIP codes
- TAPI setup
- Function Administration
- Export Documents
- Export Addresses

Shut down DIAS

If you wish to minimize the start menu in the taskbar, open the window "Session information" in the DIAS start menu.
Select "Show Start menu in taskbar". The Start menu will now be minimized in the taskbar.


Session information
Preferences
LocalServer
Password
Appserv
System
Permissions
User preferences :
Max. record fetch: 100
Language: English
On double-click: View
Save follow-up every: 30 minutes
Refresh flow-window: 5
Sort Flow By: On Documenttype
Sort Archive By: On last version (most recent first)
Default Follow-up Type: Telephone calls
Max document age for archive queries (in days): 2000
Show Startmenu in taskbar ?
Use Document date in Follow Up ?
Automatically start search when linking docs?
Delete original files on fileimport ?
Use profiles as distribution-list when creating a flow
Filter Virtual Records on Address
Fill in e-mail address when mailing documents
Outlook : enable auto. archiving of e-mails
Exit

The DIAS Start menu will now be minimized in the taskbar.



5. Document management

Click on this icon to open the document management window

5.1. General principle

Each document that is put in DIAS is immediately archived. With "document" we do not merely mean single pages. A document in DIAS consists of 1 or several pages which together constitute a document. A document can be a scanned form, an e-mail, a fax, a document made in Microsoft Word, a multimedia file, etc.

This general principle does not mean that each user can consult all the documents: depending on the access rights to the administrative file, document type, project, etc. documents will be displayed or not.

DIAS is more than a collection of files. Every file is related with a record that contains information about the archived document (comparable with a filing card that is stapled to a document). The content of the record can be determined by the Administrator. The content of the fields in this manual can therefore be different from your own application.

In DIAS it is possible to look up documents by means of document type, document owner or unique document defined criteria (UDP's), as well as all possible combinations of search criteria. In addition you can also retrieve documents based on their creation date, status or internal DIAS number. It is also possible to search in the textual contents of the archived documents.

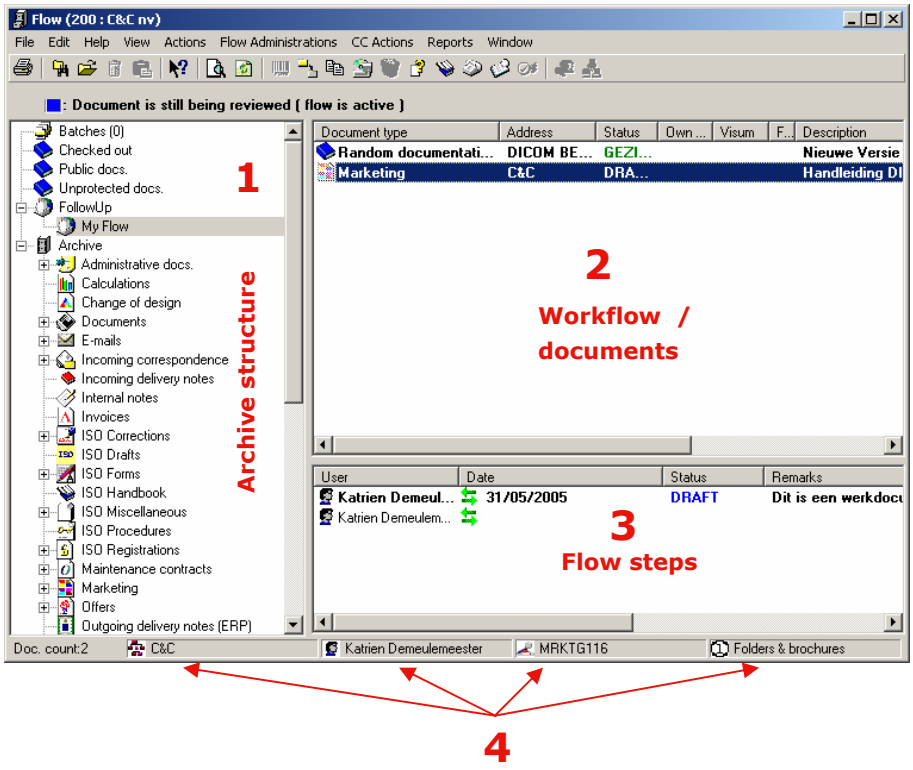
You can also import files in the DIAS archive. This means that you can incorporate all documents or files that are now stored on your hard disk or network.

5.2. The document management window

Click here to activate the document management window.

The document management window consists of 3 different sub-windows and a range of panels:

- Archive structure (left)
- Workflow / documents (right on top)
- Flow steps (right bottom)



1 Archive structure:

In the left window you find an overview of all the document types (invoices, contracts, e-mails, faxes, etc.) that are used in your company. Each document type can have a sub-level. The composition of this structure will vary for each company. The structure is flexible and can be extended at any time.

2 Workflow / documents:

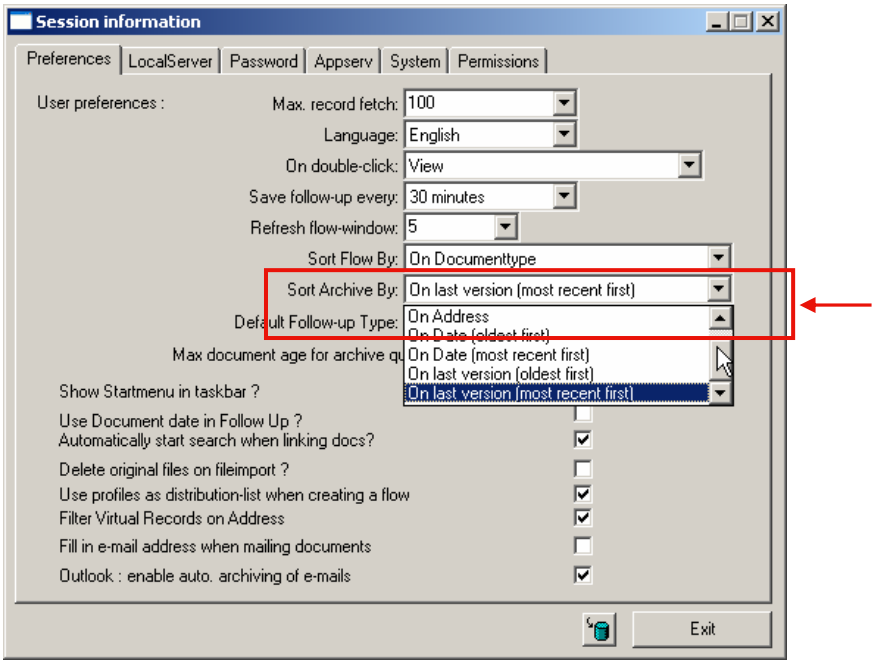
When you activate the document management window, DIAS standard shows you your personal workflow. When you select another document type in the archive structure, your workflow will be replaced by the requested documents.

You will notice that some documents are coloured blue and others black. Bleu means that the document is still in the workflow of someone. When the document is not or no longer in someone's workflow it will be coloured black.

In the different columns you already get some information regarding the documents:

- Document type: indicates the type of document (contract, e-mail, fax, invoice, etc.)
- Address: indicates the contact person to whom this document is related.
- Status: code assigned by the user to indicate the status of the document
- Creation date: date on which the document was added to DIAS. This date is not necessarily the date on which the document was created, ex. you write a letter on the 10th of October but you import the letter on the 12th of October. For DIAS the creation date is 12 October.
- Last modification: this is the date on which the document was adapted for the last time by means of "Version management".
- Related docs: the paperclip illustrates that there are other files linked with the document.
- Description: short description or comment appended to the document when adding the document to DIAS.

→ You can sort the lists in the right window ascending by clicking on the column titles or descending by double clicking.
In the window "Session Information" you can also determine the standard sorting order:
(To open the session information, click on in the DIAS start menu.)

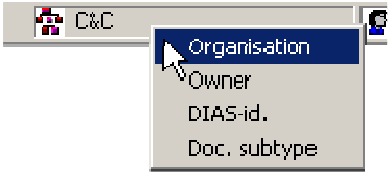

Session information
Preferences
LocalServer
Password
Appserv
System
Permissions
User preferences :
Max. record fetch: 100
Language: English
On double-click: View
Save follow-up every: 30 minutes
Refresh flow-window: 5
Sort Flow By: On Documenttype
Sort Archive By: On last version (most recent first)
Default Follow-up Type: On Address
On Date (most recent first)
On last version (oldest first)
On last version (most recent first)
Max document age for archive qu
Show Startmenu in taskbar ?
Use Document date in Follow Up ?
Automatically start search when linking docs?
Delete original files on fileimport ?
Use profiles as distribution-list when creating a flow
Filter Virtual Records on Address
Fill in e-mail address when mailing documents
Outlook : enable auto. archiving of e-mails
Exit

3 Flow steps:

In this window you can see who has received the document in his / her workflow. You can see when the document has been treated, which status it received and you can read the remarks made by the addressee.

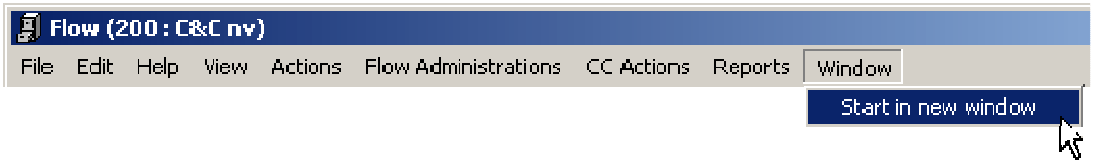
4 Panels:

Below in the document management window you see different "panels": in the panels you get additional information concerning the selected document. You can adjust the contents of the panels by clicking with the right mouse button in the panel and then you can choose the information you wish to see.



Start several windows

In the window "Document Management" it is possible to start several windows. The first window is standard in "flow"-mode. In the menu "Window" you can chose to open a second with in "archive"-mode.



In the Windows taskbar you can distinguish the windows easily by the window heading (Flow - Archive) in order to switch quickly from flow to archive mode and vice versa:

5.3. The document Management toolbar

Print: printing the file on the standard printer.

Search: search for specific documents.

Modify: opening the "document details".

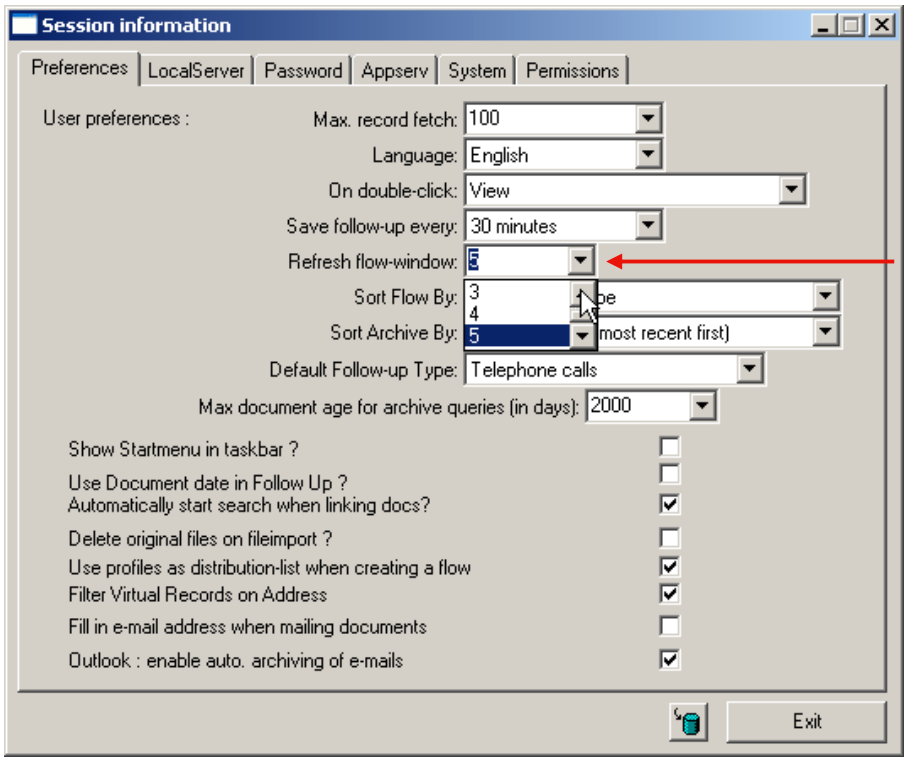
Delete: remove a document from the archive.

Select: when you open the archive from another window, ex. to relate documents to one another, you can use this pictogram to select.

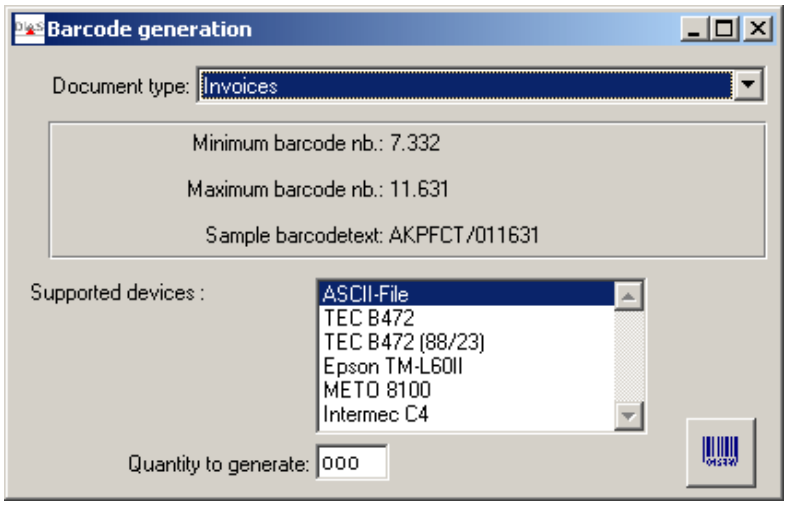
Help: opening the help menu

Detail: opening the "document details" in order to view the document and perform the required actions.

Refresh: Every xxx minutes DIAS looks if there are new documents available. If you do not want to wait until DIAS automatically refreshes, you can click on the refresh button to update the content of your page.
In the "Session information" window you can specify in the "Refresh flow-window" field after how many minutes the flow-window should be renewed.



Barcodes: generating barcodes



Change administrative file (dossier): to switch to another file

Copy document: to copy a document (ex. To make the same offer for a different customer).

Import: to import documents or files saved on your hard disk or network.

Trashcan: shows all the documents that are put in the "trashcan".

Unknown documents: shows the incoming faxes that have not been treated.

Related documents: gives an overview of all the files related to a document.

Follow-up: to register telephone calls, internal notes and visit reports.

Planning: to plan tasks and appointments in your agenda.

Public documents: directory with documents that are accessible by everyone.

Out of office: automatically forward documents to a colleague during your absence.

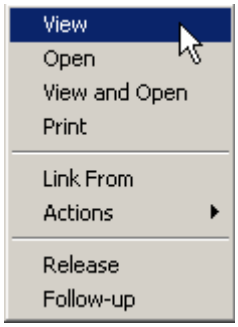
Pre-defined flows: apply one of the available pre-defined document flows.

Global flow: automatically assign a flow to a range of documents based on the document type and creation date.

6. Document Details

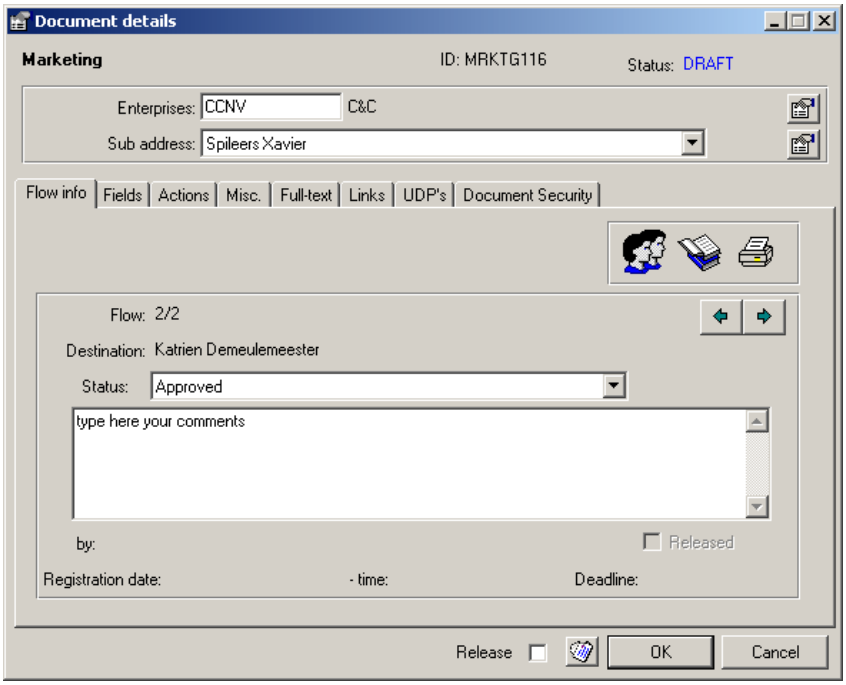
To op the "Document details":

- Click on Detail
  OR
- Click with the right mouse button on document and select "Open".

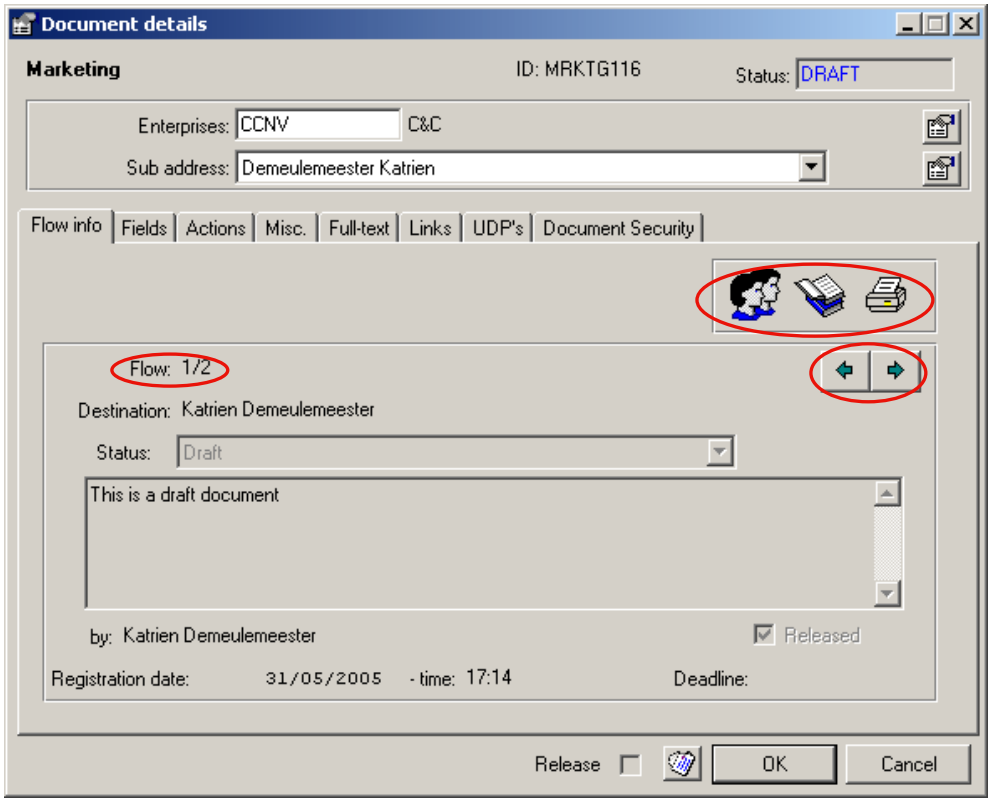


The other possibilities are:
View: opens the document in its original application (ex. For a Word document Microsoft Word will be opened).
View and open: opens the detail window AND the document in its original applications.
Print: to print the document with the standard printer.

Document details window:

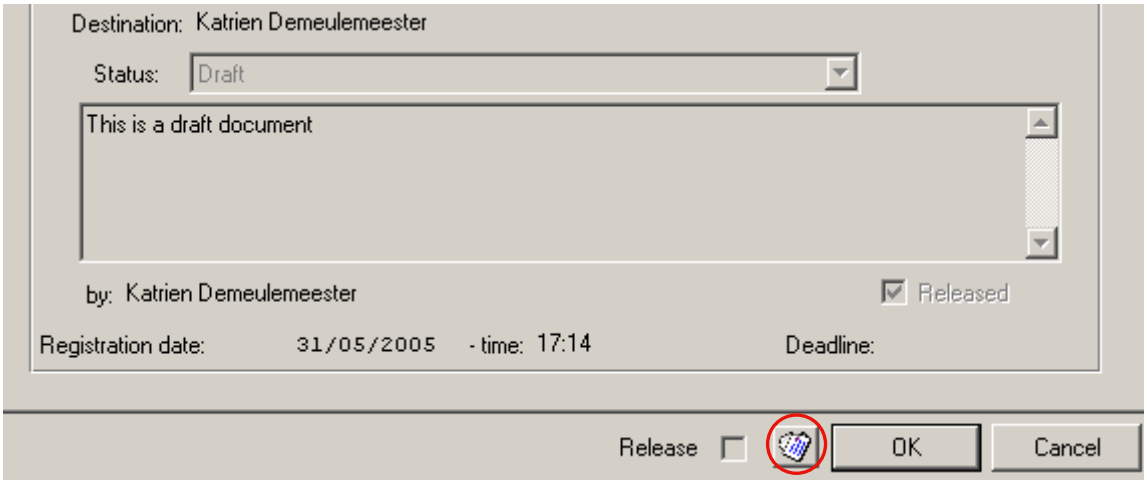


6.1. Flow information



When opening the document details you standard see the first flow step. To move to the next or previous flow steps you click on the arrows (or). On the left side you can see which flow step is shown (1/2) and on the right side how many flow steps there are in total (1/2).

Overview of the different fields:



- Destination: the person to whom the document is addressed
- Status: the status given to the document by the addressee
- Comments: the comments or remarks of the addressee
- By: name of the person who released the document
- Registration date and time: date and time when the addressee released the document

- Deadline: if someone determined a deadline for the workflow of the document this date will be shown here. Thanks to the deadline you can see if the addressee treated the document within the time limit.

On the document detail window you see the following pictograms:

View document: click on the button to open the document in its original application (ex. a Word document will be opened in Microsoft word).

Add persons to the flow: add a workflow to the document = forward the document to one or several users.

See related document: see the files related to the document or create new document relations (ex. relate an invoice to the order form).

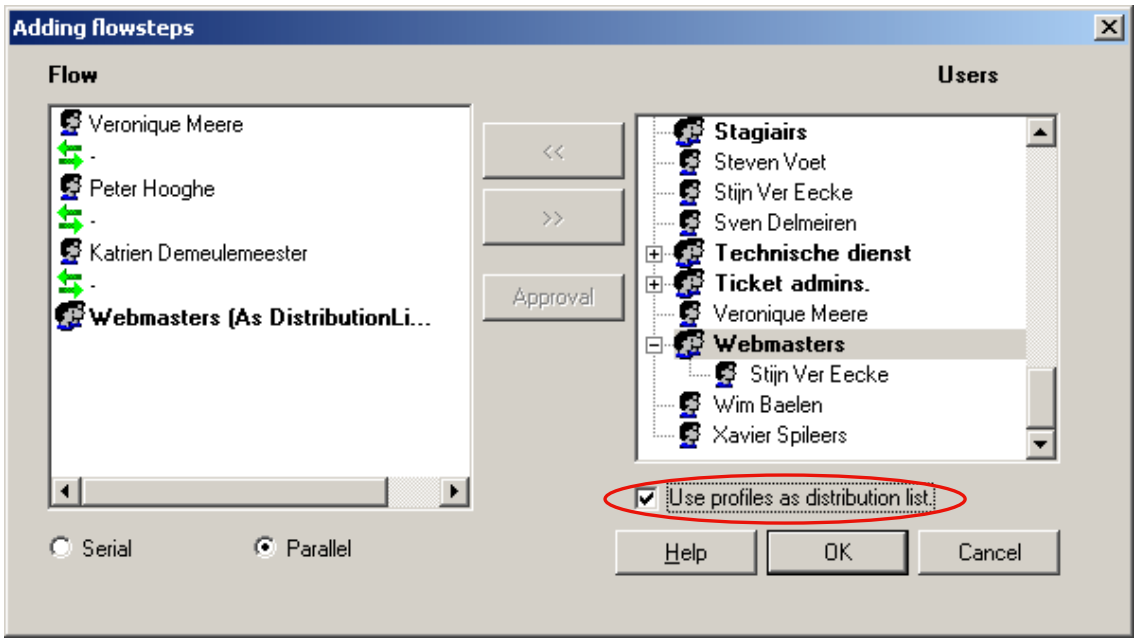
Print the document: print the document on the standard printer.

View document

Click on this pictogram to view the document in its original application. (ex. a Word document will be opened with Microsoft Word)

Add persons to the flow

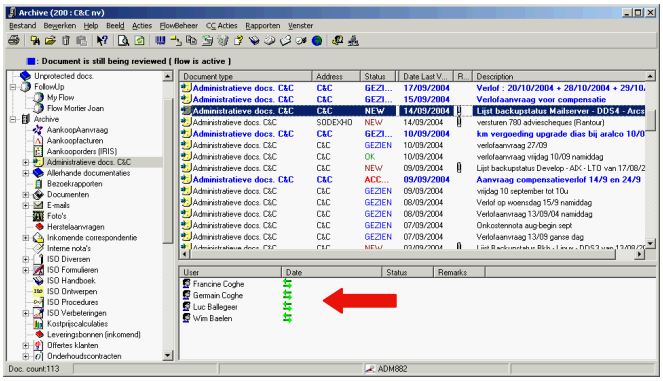
Click on this pictogram to add persons to the flow.



In the right window you see a list of all the DIAS users (+ regular font style) and DIAS user groups (+ bold font style) in alphabetical order.
You can choose whether you would like to use the DIAS user group as distribution list or not. If you choose to send is as distribution list, each member of the user group receives the document in his or

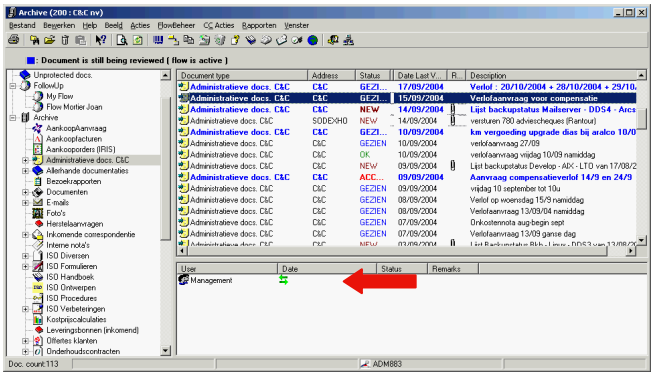
her workflow and has to deal with the document and release it. You can also choose not to use the distribution list. Then the document will be send to all the members of the group but only one person of the group has to deal with the document and release it. From the moment one person of the group releases the document it will disappear from the entire flow.

DIAS user group "Management" used as distribution list:



Every member of the user group has to deal with the document.

DIAS user group "management" not used as distribution list:



Only one member of the user group has to deal with the document.

You can move the users and / or user groups to whom you wish to send the document from the right window to the left window by clicking on << or by double clicking on the name. To remove users and / or user groups, you select them in the left window and click on >> or double click on the name.

Attention!

If the document you wish to flow has been flowed previously, you will see a list of the former addressees when opening the flow window. You can add persons to the flow list, but you can not remove users or user groups from the existing list or change the flow order of the existing list. The users who have released the document are shown in read.

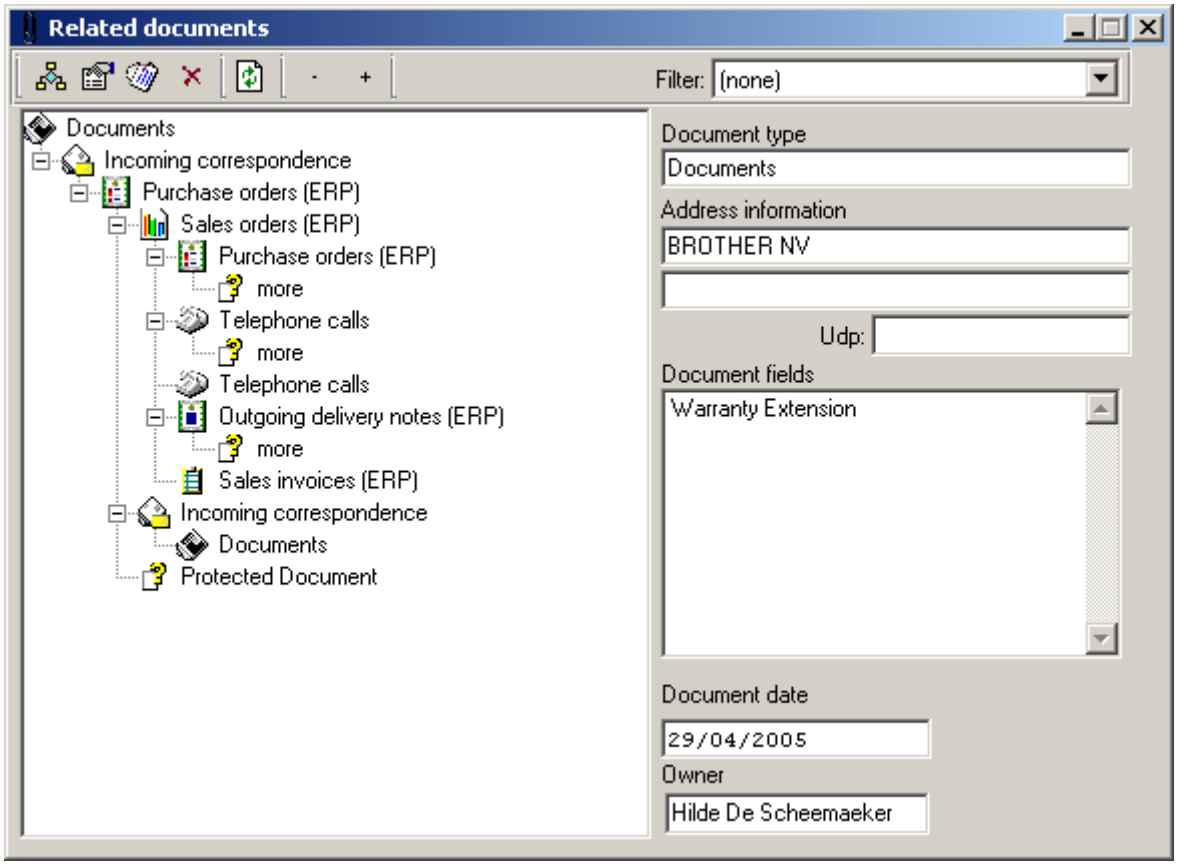
The buttons Serial or Parallel determine the way of forwarding the flow. You can find more information on serial and parallel workflow in the section "Serial and Parallel workflow" on page 45.

With the button Approval you can define for each flow step if approval is required. You can find more information on the approval of documents in the section "Approve and Signing documents" on page 53.

Document relations

Click on this pictogram to see the related documents.

In DIAS it is possible to related documents to one another. The document relations allow you to create unequivocal links between documents and build up comprehensive files.



In the tree structure you get a clear view on the different relations. You also see the relations of the related documents.
In the Filter menu you have the possibility to filter one document type from the tree structure.

On the related documents window you see the following pictograms:

Add a relation: the archive window will open and you can search and select the document you wish to relate. Standard DIAS will show all the documents with the same address as the main document. By double clicking on a document the relation is completed.

Properties of this document: opens the "document details" window.

View this document: opens the document in its original application.

Remove this relation: removes a relation between documents. Remark that only the relation will be removed, not the related document.

Refresh: the related documents window automatically refreshes every xxx seconds.

You can click on the refresh button to update the content of your page manually.

- **Down one level**: Relations are grouped in levels. When a document has several levels of relations it can be more clear to restrict your view the first level and / or second level relations. With this button you can reduce the number of levels shown.
- **Up one level**: to increase the number of levels shown.

Attention!

You can only remove first level relations. If you wish to remove relations of a lower level, you have to do this on the document in question.

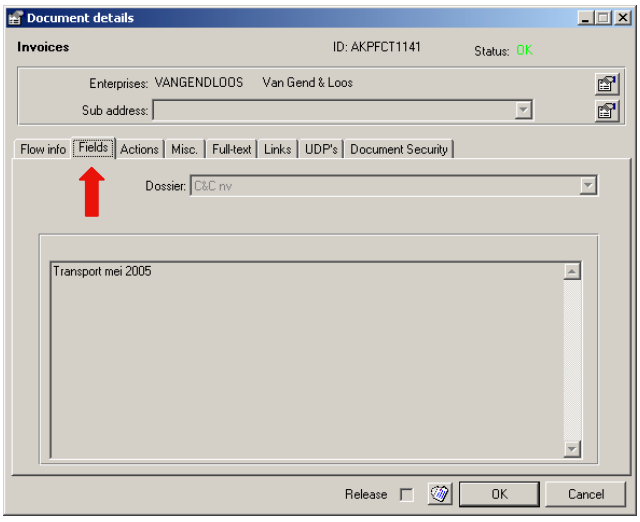
Print document

Click on this pictogram to print the document on your standard printer.

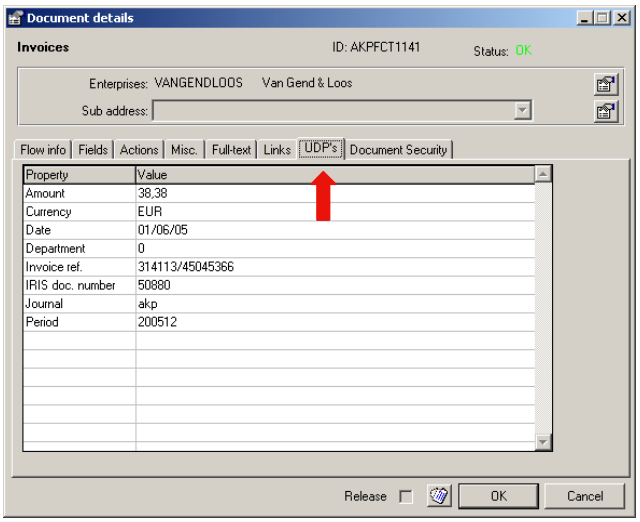
6.2. Fields and UDP's

On the tab Fields you find a description of the document and you also see to which administrative file or dossier the document belongs. This information has to be correct; therefore changes in the company name are registered in the log.

For each document type you can create several specific fields or UDP's (User Defined Properties). In the example below you see the UDP's for an invoice.



Document details: Fields

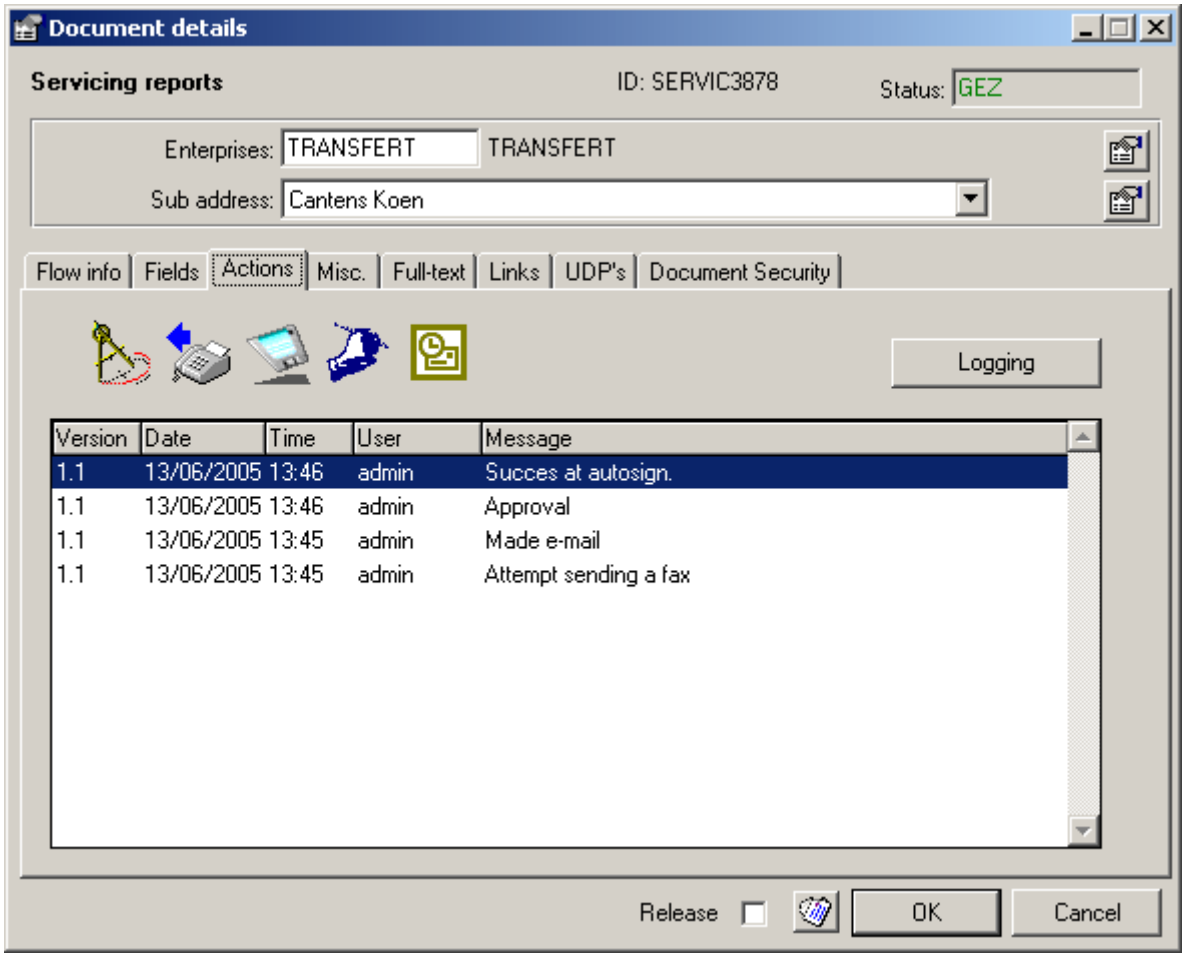


Document details: UDP's

6.3. Actions

On the Action tab you find 2 elements:

- Action buttons: the action buttons allow you to execute certain actions with a document. The number of actions depends on the settings of the document type (managed by the administrator). Some documents you will be able to email, others you won't.
- Log: every action is registered in the log and is visible for other users.



Attention!

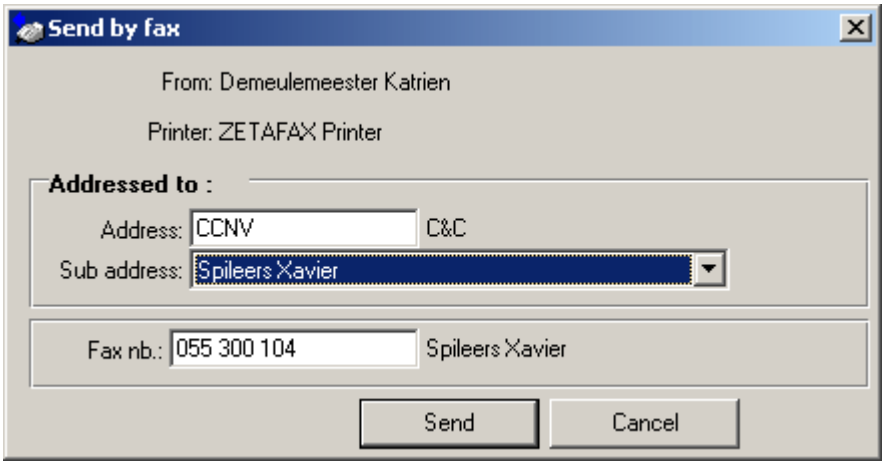
Depending on the software your company possess and the action settings defined per document type, you will see other action buttons. Example: for the action "Send by fax" you need to have a fax server.

Action buttons

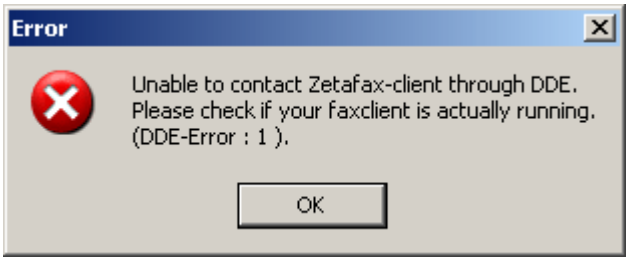
As the description and the pictogram assigned to an action button can differ per company it is not possible to give an unequivocal definition for the action buttons.

Start versioning: you can find more information on versioning in the section "Versioning and Automatic Versioning" on page 59.

Send by fax: to fax the document (using fax software)
In this window you set the coordinates of the addressee: company and contact person or department. DIAS automatically faxes the document to the correct number.



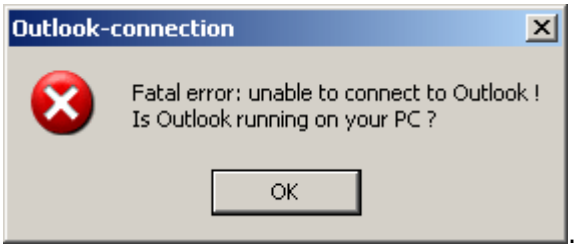
Remark: if you wish to fax, your Zetafax-client (or other fax software client) should be running otherwise you will get this error.



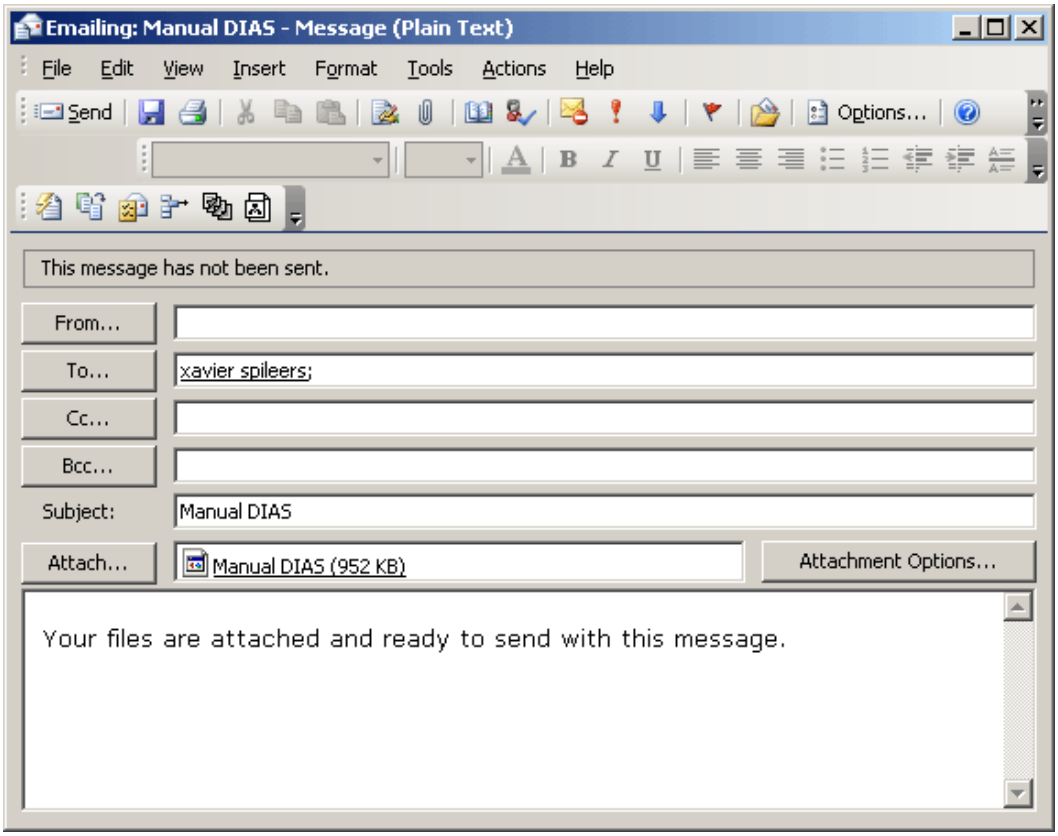
Save to disk: save a copy of this document archived in DIAS on your local disk.

Sign: to put your electronic signature on a document.
The administrator determines who has the authority to sign which document types. He / she also decides where the signature will be placed on the document. You can find more information on signing documents in the section "Approve and Sign documents" on page 53.

E-mail with Outlook:
Remark: if you wish to e-mail, MS Outlook should be running otherwise you will get this error:



DIAS automatically generates an e-mail with the document in attachment. You fill in the subject line and the text of your email. Finally you indicate the e-mail address or look it up in the address book.



Link with delivery note (not available in all versions): this action is only available for IRIS software users. DIAS will automatically relate the selected delivery note of your supplier with the corresponding proof of reception of the received goods (printed from IRIS). This action is only available for the document type "delivery note".

Log

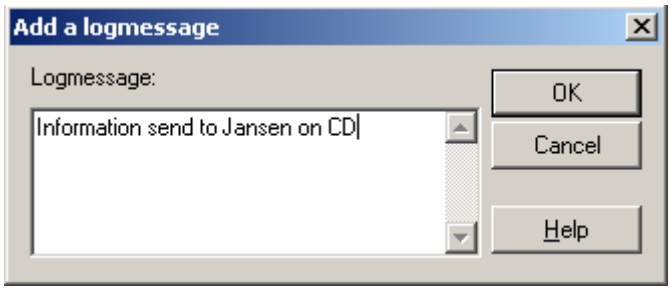
In the log you can see what has been done with the document. You see the date, time, user and message (description of the action). Users can not remove information from the log.

Version	Date	Time	User	Message
1.1	13/06/2005	13:46	admin	Succes at autosign.
1.1	13/06/2005	13:46	admin	Approval
1.1	13/06/2005	13:45	admin	Made e-mail
1.1	13/06/2005	13:45	admin	Attempt sending a fax

However you can manually create new log items:

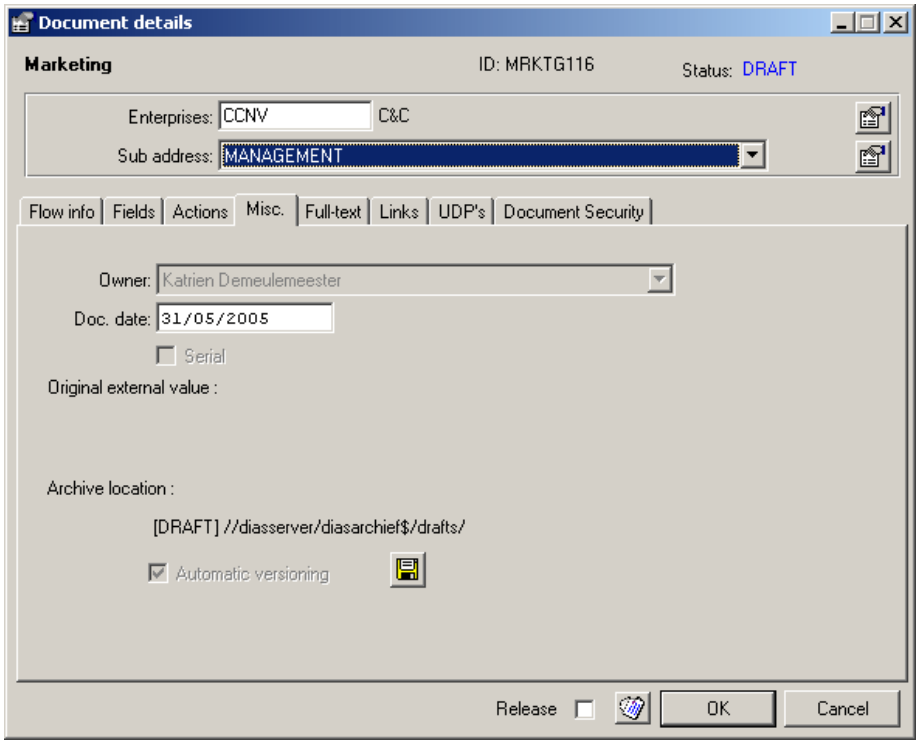
Click on

Type the message you whish to add to the log. Click OK to confirm.



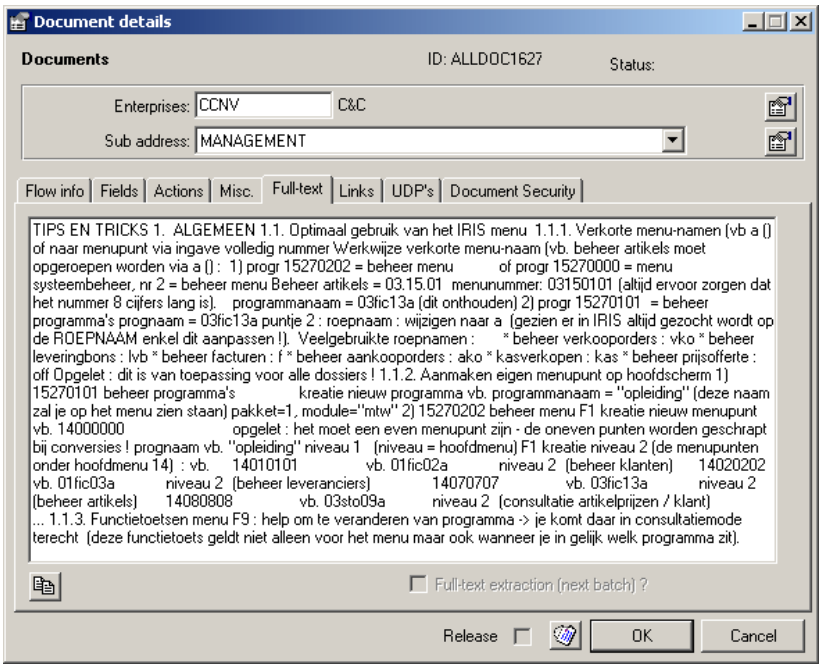
6.4. Miscellaneous

On the tab Miscellaneous you find additional information concerning the document: who added the document to DIAS, when, is there a serial or parallel flow, etc.



6.5. Full-text

On the tab Full-text you find the complete textual content of the document.


Document details
Documents
ID: ALLDOC1627
Status:
Enterprises: CCNV C&C
Sub address: MANAGEMENT
Flow info
Fields
Actions
Misc.
Full-text
Links
UDP's
Document Security
TIPS EN TRICKS 1. ALGEMEEN 1.1. Optimaal gebruik van het IRIS menu 1.1.1. Verkorte menu-namen (vb a () of naar menupunt via ingave volledig nummer Werkwijze verkorte menu-naam (vb. beheer artikels moet opgeroepen worden via a () : 1) progr 15270202 = beheer menu of progr 15270000 = menu systeembeheer, nr 2 = beheer menu Beheer artikels = 03.15.01 menunummer: 03150101 (altijd ervoor zorgen dat het nummer 8 cijfers lang is). programmanaam = 03fic13a (dit onthouden) 2) progr 15270101 = beheer programma's prognaam = 03fic13a puntje 2 : roepnaam : wijzigen naar a (gezien er in IRIS altijd gezocht wordt op de ROEPNAAM enkel dit aanpassen !). Veelgebruikte roepnamen : * beheer verkooporders : vko * beheer leveringbons : lvb * beheer facturen : f * beheer aankooporders : ako * kasverkopen : kas * beheer prijsofferte : off Opgelet : dit is van toepassing voor alle dossiers ! 1.1.2. Aanmaken eigen menupunt op hoofdscherm 1) 15270101 beheer programma's kreatie nieuw programma vb. programmanaam = "opleiding" (deze naam zal je op het menu zien staan) pakket=1, module="mtw" 2) 15270202 beheer menu F1 kreatie nieuw menupunt vb. 14000000 opgelet : het moet een even menupunt zijn - de oneven punten worden geschrapt bij conversies ! prognaam vb. "opleiding" niveau 1 (niveau = hoofdmenu) F1 kreatie niveau 2 (de menupunten onder hoofdmenu 14) : vb. 14010101 vb. 01fic02a niveau 2 (beheer klanten) 14020202 vb. 01fic03a niveau 2 (beheer leveranciers) 14070707 vb. 03fic13a niveau 2 (beheer artikels) 14080808 vb. 03sto09a niveau 2 (consultatie artikelprijzen / klant) ... 1.1.3. Functietoetsen menu F9 : help om te veranderen van programma -> je komt daar in consultatiemode terecht (deze functietoets geldt niet alleen voor het menu maar ook wanneer je in gelijk welk programma zit).
Full-text extraction (next batch) ?
Release
OK
Cancel

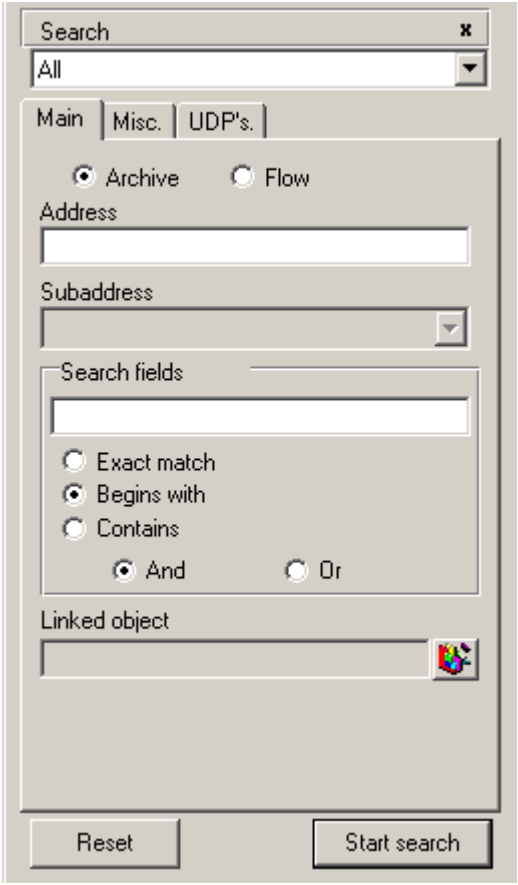
Attention!

For scanned documents the textual contents is only available if you use an OCR-module.

7. Search window

With the DIAS search engine you can perform complex search actions to retrieve a document in just a few seconds time.

To activate the search window click on Search . The search window will appear in the left window.



Attention!

Do not forget to indicate the location of your search: Archive or Flow.

Main tab

In the Main tab of the search window you see the following search criteria:

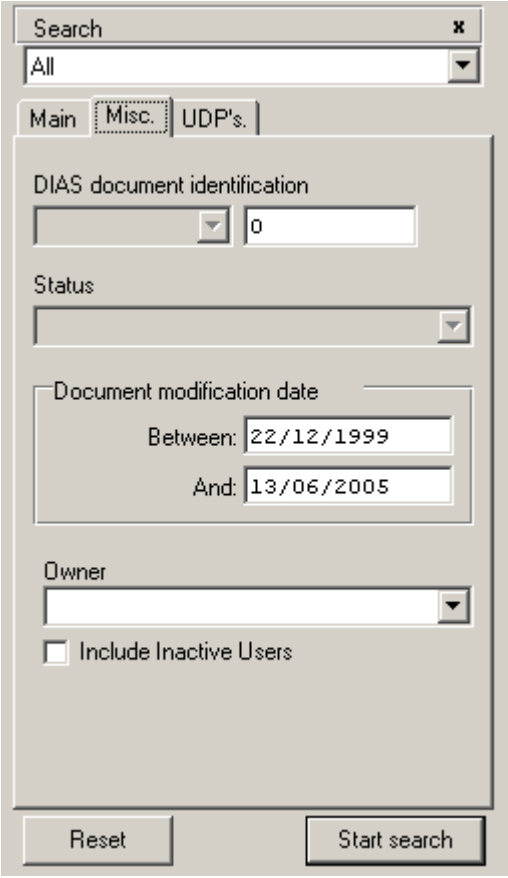
- Document type: select here the document type you are looking for. If you do not know the document type or you want to see all the document types, choose "All".
- Address: fill in the name of the company or contact person you are looking for.
- Sub-address: if the address has related departments or contact persons you can indicate them here.
- Search fields: if you wish to search on the content or description of a document, you fill in one or more keywords and you choose one of the 3 search modalities: *exact match*, *begins with* or

contains. If you look for several words at the same time, you can use the AND or OR function. DIAS will look in the contents of the archived documents for the keywords. This is the most time-consuming and the least accurate search method. In combination with other search criteria you can refine your selection and obtain the desired result. Do not look for words that are too general: articles, nouns, etc. It is obvious that you can not use keywords to search for graphical files, pictures, etc. You can also make use joker signs.

- Linked object: opens the window "virtual tables".

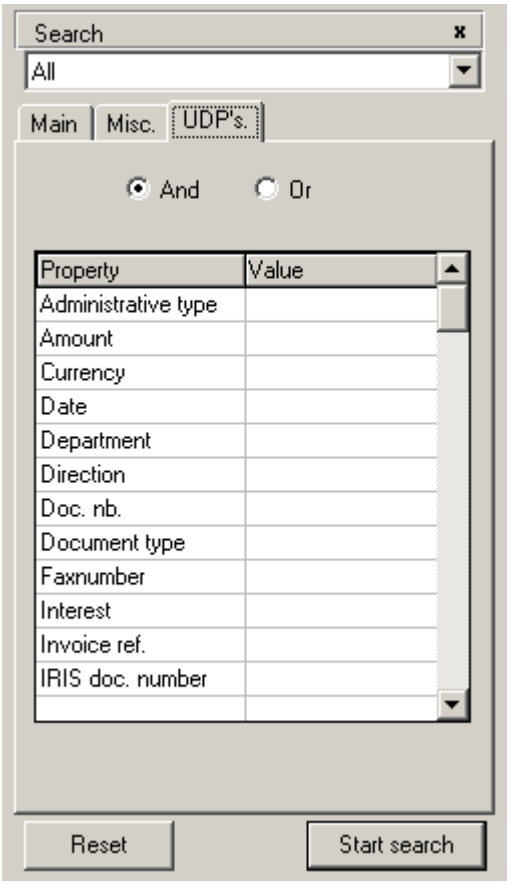
Miscellaneous tab

In the Miscellaneous tab of the search window you see the following search criteria:



- DIAS document identification: with this option you can look for a document based on the unique DIAS number. Remark: this is not the document identification number from an external application!
- Status: you can look for a document based on their status.
- Document modification date: indicate here the creation date (or a range of dates) of the document you search.
- Owner: the person who added the document to DIAS.
- Include inactive users: you can choose to include documents that have been entered by inactive users (former employees).

UDP's tab



Certain document types can have specific fields (User Defined Properties). For example: invoices you can search for the amount, the invoice number, etc.

With the Reset button you reset all the search criteria to the standard values.

With the Start search button (or the Enter-key) you begin the search. The search results will be shown in the document overview.

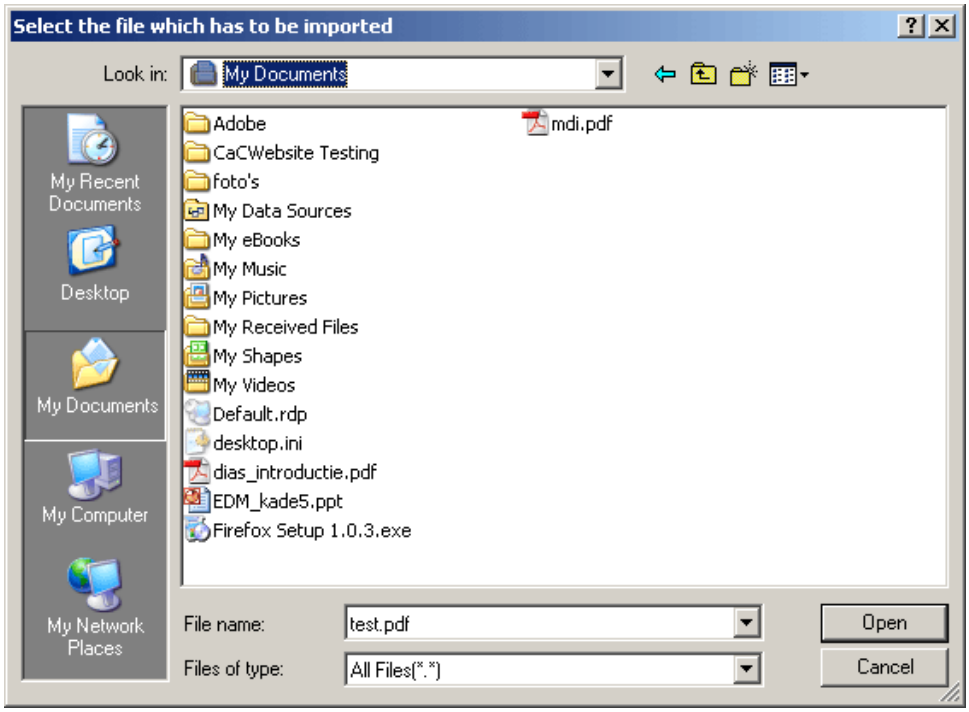
Attention!

You can carry out several search actions after one another (a new search in the results of a previous search action).

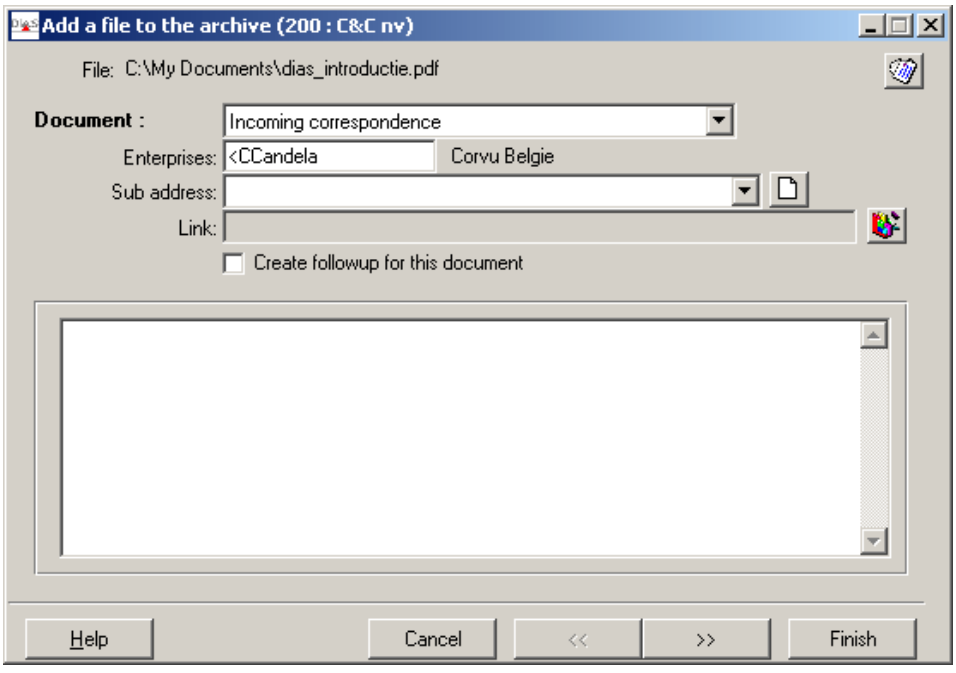
8. Import files in DIAS

With DIAS it is possible to import files in the archive that are stored on you local disk or on the network.

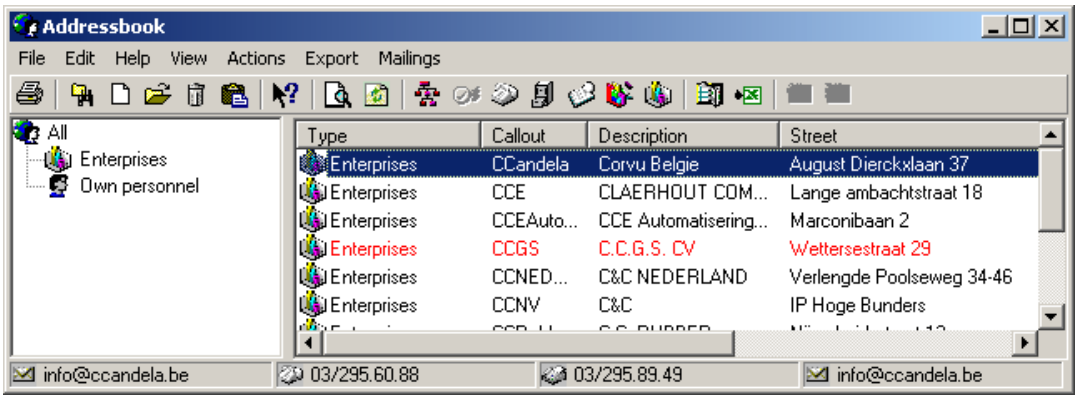
- Open the archive window and click in the toolbar on Import
  (or in the menu bar: Actions → Import).
  The window "Select the file which has to be imported" will open:



- Look up the document you wish to import and click Open
  The window "Add a file to the archive" will open:



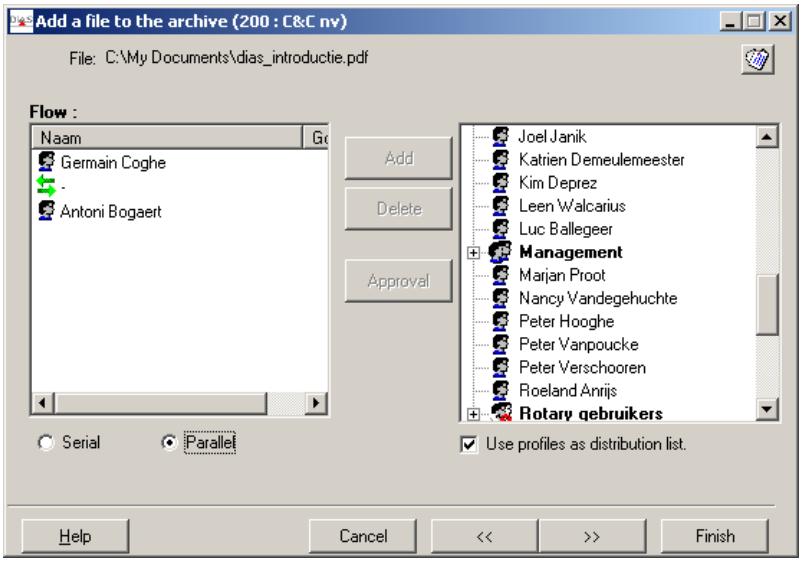
- In this window you select the document type and fill in the name of the customer, supplier or other contact (if necessary also the sub address: department, contact …) to which you wish to relate this document. Press the TAB-key after filling in the address.
  Remark: if the name of the customer or supplier is incomplete, incorrect or if the name occurs twice in the address book, the address book will open automatically when leaving the address field:



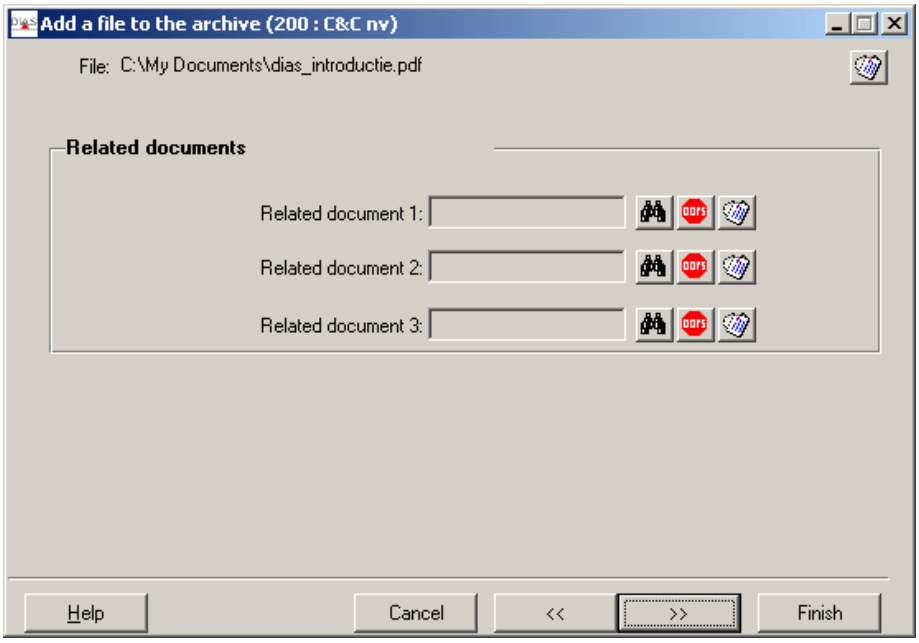
Double click on the correct contact.
The field Sub Address only appears once you have filled in the Enterprise Address. Depending on the structure of you Address book you will be able so select a department or a specific contact person. You will only see those departments or contacts belonging to the enterprise you have selected.

Filling in these fields is **extremely important** as they will determine the place of the document in the archive.
DIAS places a copy of the document in the archive. If it is a MS Word or MS Excel document DIAS will also "read" the content of the document. The text will be included in the full-text database, which allows you to carry out full-text searches afterwards.

- Click on >> to complete the next window.
  When you wish to add a flow to the document you can select the addressees is this window.



- Click on >> to complete the next window.
  In this window you can relate the imported document to another archived file.

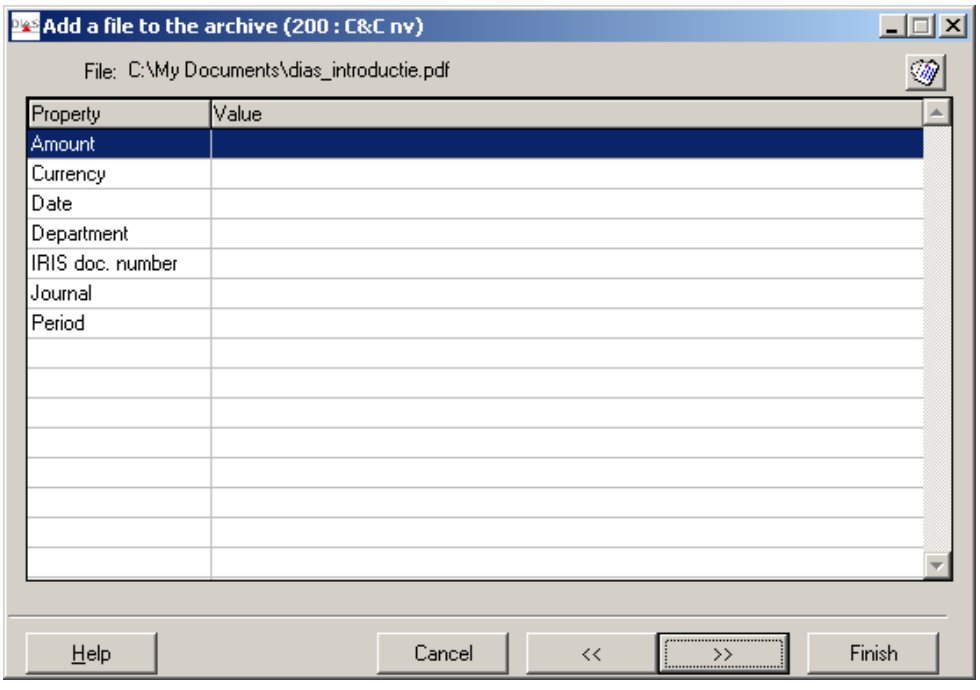


Search a document: click here to look up the related document. Standard DIAS will show all the archived documents with the same address as the document you are importing.

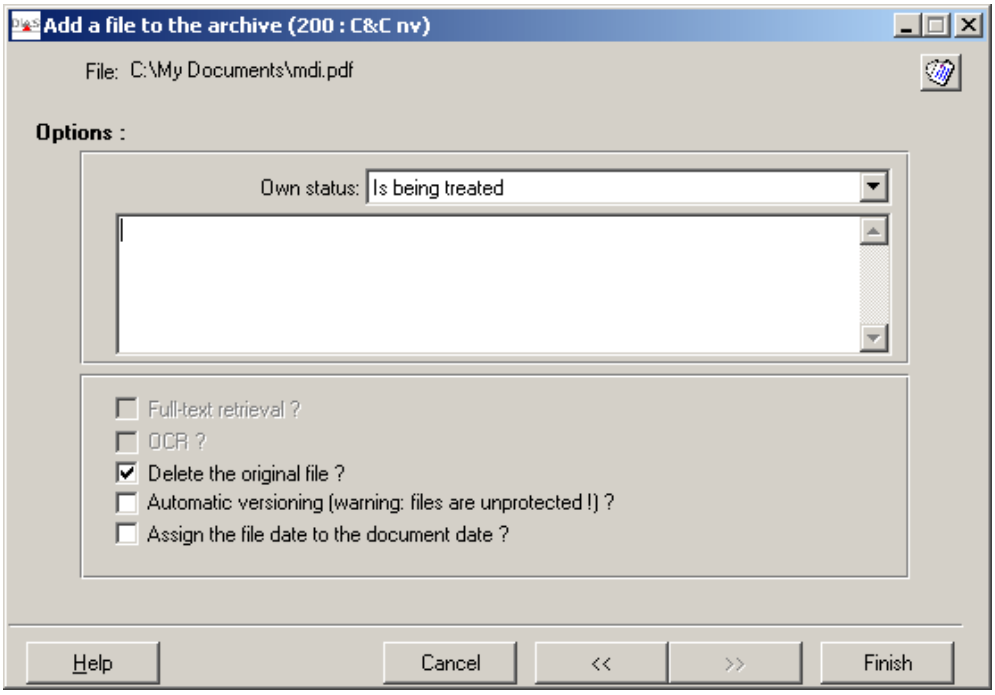
Remove the related document: remove the relation between the selected documents.
Remark: you will remove the relation, not the document itself.

View this document: view the document in its original application.

- Click on >> to complete the next window.
  In this window you fill the UDP's (User Defined Properties):



- Click on ›› to complete the next window.
  In this window you assign a status to the document:



- Full-text retrieval: DIAS will "read" the document and include the contents of the document in the full-text database (in order to allow full-text retrieval afterwards). This only possible for Word-, Excel-, RTF- and Txt-documents.

- OCR: Optical Character Recognition = character recognition of the scanned text (only applicable if OCR-module installed).
  DIAS will transform the scanned text in a digital text in order to allow full-text retrieval afterwards. This process automatically runs on the background and the complete textual content of a document is saved in an indexed field.
  Select this option if you wish to mark the imported document for the next OCR-processing.

- Delete the original file: DIAS will standard delete the original file. If you uncheck this option the original file stays unchanged. However there is no relation between the original file and the file in the DIAS archive. Remark: this option is standard checked.

- Automatic versioning: check this option if you want to modify the document frequently without saving copies of the previous versions. DIAS will automatically replace the original file. If you wish to preserve a copy of every adjustment, you should use "Versioning" (find more information on this in the section "Versioning and automatic versioning" on page 59).

- Assign the file date to the document date: standard the date of introduction in DIAS is registered. With this option you can choose to use the file date instead.

Click on Finish to finish the import of your document

Supported file types

You can import all kind of file type in DIAS. However to view the documents you need to have the original application or an appropriate "viewer".

The most common file types:

Type	Description	Full-text	Full text - if OCR
Txt	Text	Yes	-
Rtf	Rich-text format	Yes	-
Doc	MS-Word	Yes	-
Xls	MS-Excel	Yes	-
Msg	E-mail message	Yes	Yes
Tif	TIFF (graphical)	No	Yes
Bmp	Bitmap (graphical)	No	Yes
Jpg	JPEG (graphical)	No	No
Pdf	Adobe Acrobat	No	No
Vsd	Microsoft Visio	No	No
Mdb	MS-Access database	No	No
Pps	MS-PowerPoint presentation	No	No
Ppt	MS-PowerPoint file	No	No

The last column but one indicates if a full-text field can be created in the database when importing the document in DIAS. This is also possible for graphical files such as JPEG but then only with the necessary OCR tools (last column).

9. Scan documents in DIAS

9.1. Introduction

If you wish to archive external documents (ex. Technical leaflets, incoming correspondence, pricelists of suppliers, etc) all these documents will have to be digitalised by means of a scanner. We use a scanning program that is provided together with DIAS.

Before you start scanning you should decide how you wish to scan:

- All pages together in 1 document
- Every page separately in individual documents
- A combination of both?

If you wish to scan several documents at the same time (1 document can contain several pages), you can use "patch"-pages (= page with a code) to separate the different documents or you can work with barcodes.

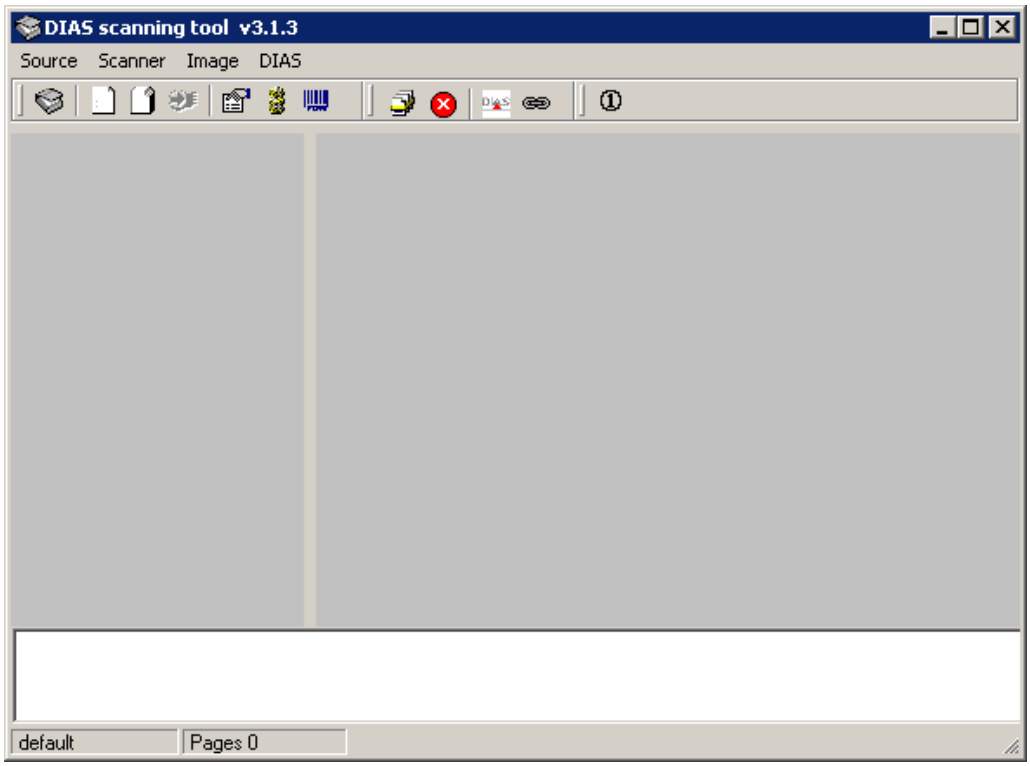
Barcode recognition:
The scan software is tuned to recognise barcodes for different document types (usually used for purchase invoices).

Patch recognition:
In order to distinguish different documents, the scan program looks for patches. Using a patch is not necessary if you use barcodes or if you scan page-per-page.

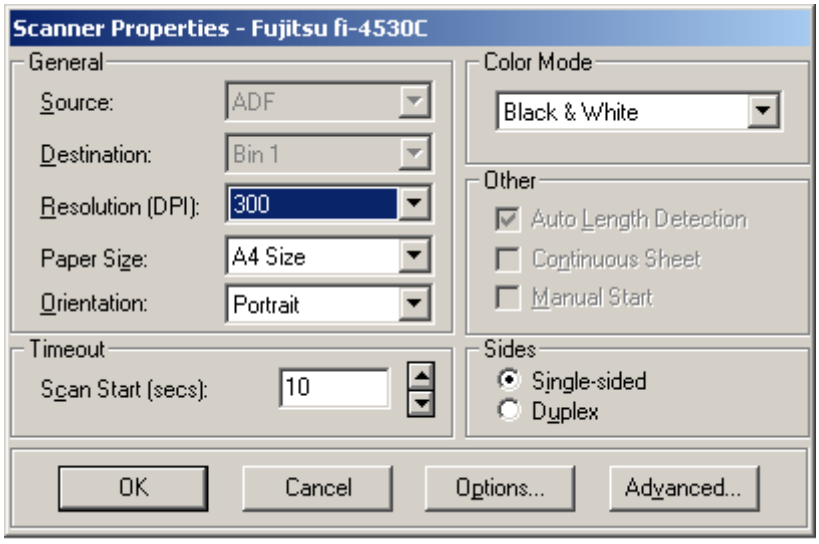
In both situations the pages should be prepared before scanning.

9.2. Scanning documents

After opening the scan program, the following window will appear:



- Click on Scanner properties if you wish to change the settings of the scanner:



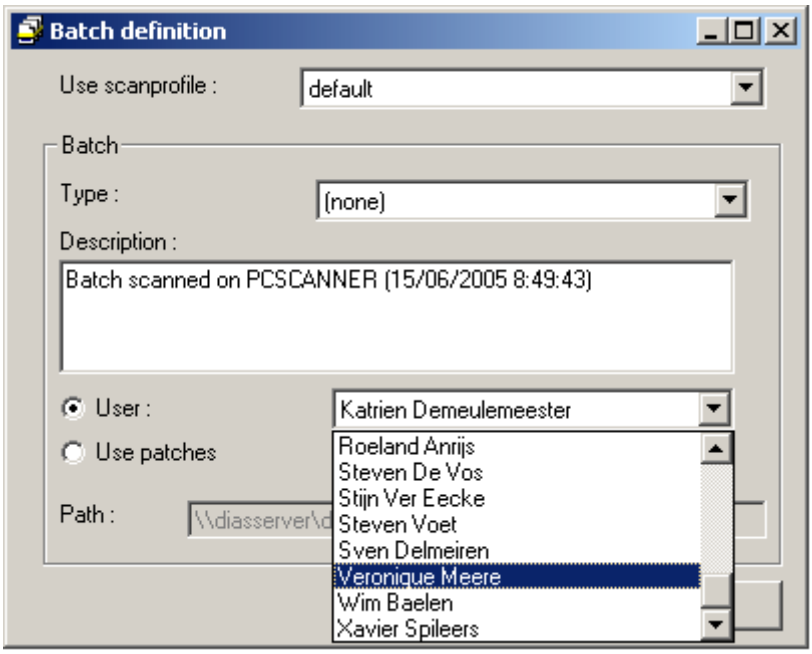
- Resolution: the resolution values depend on the possibilities of your scanner. If you wish to convert your document into editable text (OCR), it is recommended to use a resolution of 300 DPI - at least - to minimize the errors.
- Color Mode: depending on your type of scanner you will be able to select black & white, grayscale or color.

- Sides: depending on your type of scanner you will be able to scan single-sided or duplex (scans both sides simultaneously).
- Paper Size: select the paper size of the document you wish to scan (A3 - A4 - A5 - etc.)
- Orientation: select the orientation of the document you wish to scan (portrait - landscape)
- Click OK to return to the previous window.

Attention!

Scanner settings have to be customized after creating your batch and before scanning!

- Then you click on Batch Editor , the following window will appear:



- Use scanprofile: select one of the different scan profiles. The scan profile determines if you scan with a patch or barcode.
- Description: in the description field you can add a comment to the document.
- User: select the name of the user (person who will process the batch)
- Use patches: instead of selecting a user you can define with a patch the user who has to process the scanned document.
- Click OK to return to the previous window.

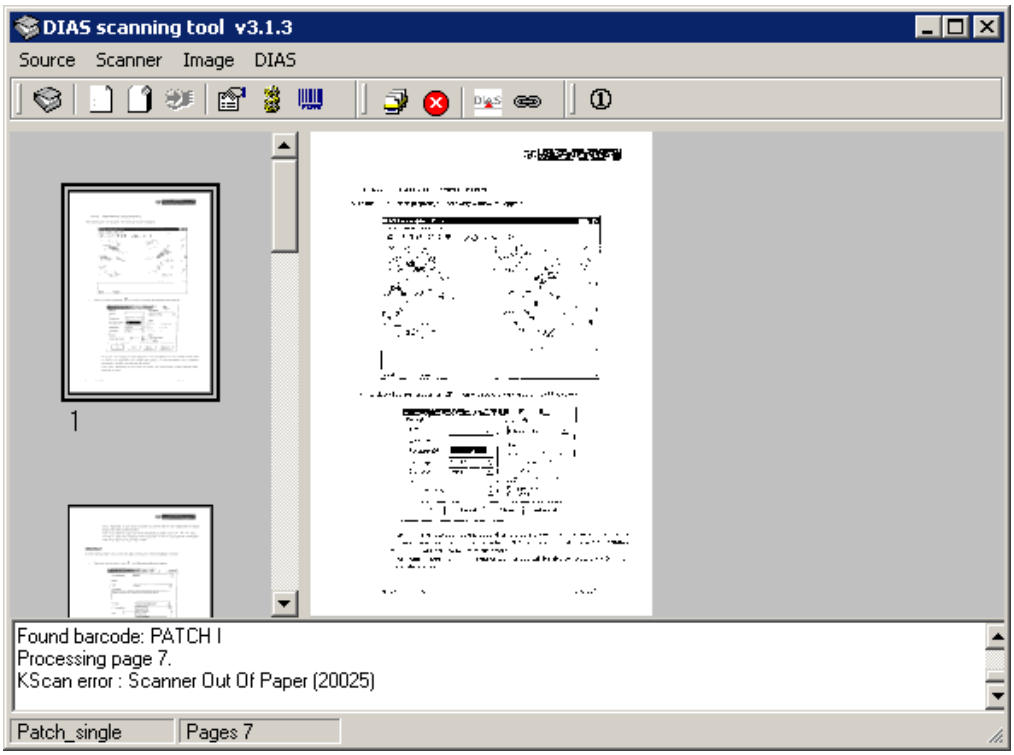
- To start scanning the document(s), click on one of the following pictograms:

  scan one page

  scan a batch

  Scanning will be started

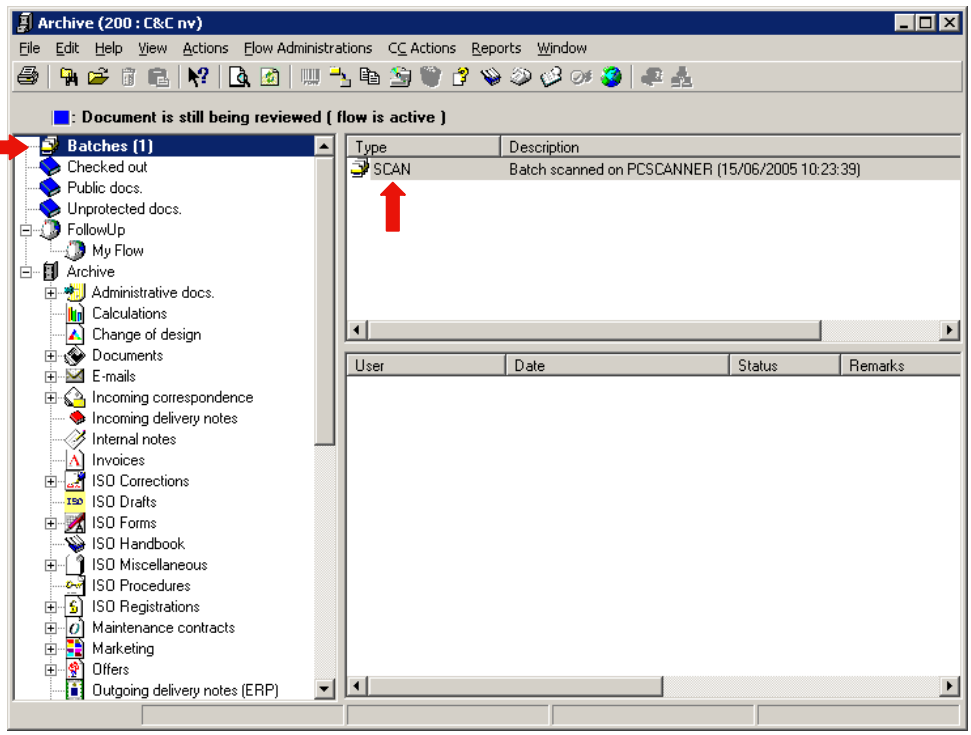
- While scanning you get an overview of the scanned documents on you screen:



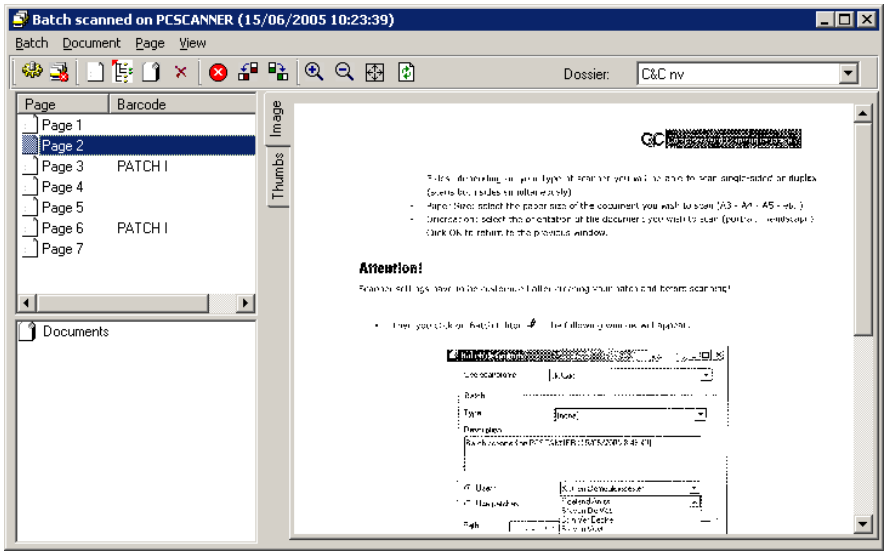
- After scanning the batch can be imported in DIAS, click on Send batch to DIAS
  The scanned documents will be placed in DIAS. You can find them in the document management window.

9.3. Processing a scanned batch

- Close the scan program and open the document management window



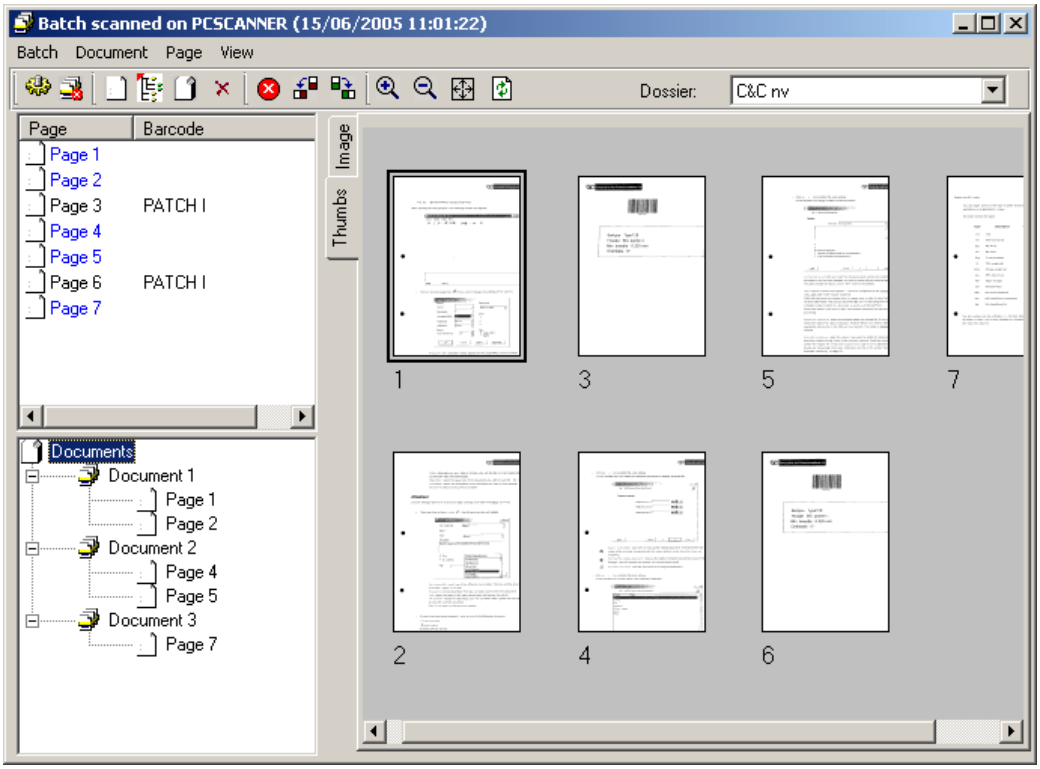
- In the overview (left window) you select the heading "Batches" and in the right window you will see all the unprocessed batches.
- To process a batch, click edit or double click on the document.
  The following window will appear:



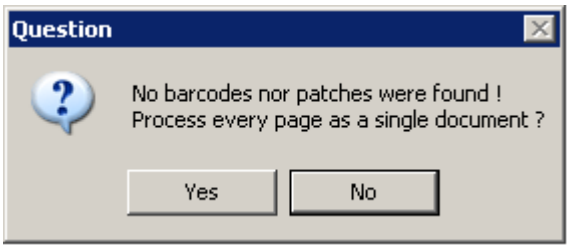
Attention!

Scanner settings have to be customized after creating your batch and before scanning!

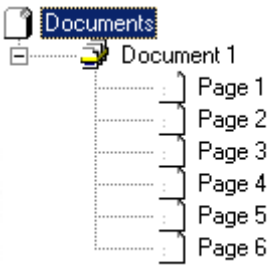
- Click on Process Batch
  If you used patches or barcodes the pages will be divided automatically into different documents.
  You get an overview of the different documents in the left window (bottom).
  (With the tabs Image and Thumbs you can change the view of the depicted pages.)



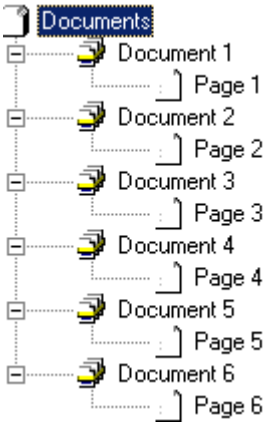
- Scanning <u>without</u> patches or barcodes:



No: one document containing several pages



Yes: each page is a separate document



You can also modify the document structure manually by dragging & dropping: drag a page from the left top window and drop it in a document in the left bottom window.

- Other options:

  Delete document: remove 1 document (can be several pages) from the batch

  Remove page from batch: remove 1 page from the batch

  Rotate left / Rotate right: turn the page left or right

  Increase magnification / Decrease magnification: zoom in or zoom out

- To import 1 document in the DIAS archive select Import Document , to import all documents of a batch select Import all Documents or to import the document as a new version / revision of an existing document.
  The window "Add a file to the archive" will appear. You find more information on this in the section "Import files in DIAS" on page 31.

- Click on Delete batch to remove the batch.

9.4. Barcodes

Using barcodes has several advantages:

- You do not need to use patches. Although this action is replaced by attaching barcodes, you gain time as you do not have to remove the patches afterwards.
- The number that is awarded to the document by DIAS stands on the document itself (as this number is part of the barcode number)
- Each barcode is unique. If by mistake you scan a document twice DIAS will generate an error. That way it is impossible to scan a document two times.

If you wish to relate DIAS with your bookkeeping software (IRIS, Navison, etc.) barcodes are compulsory. The barcodes are generated in DIAS by the administrator. The user only has to stick the barcode to the document.

Attention!

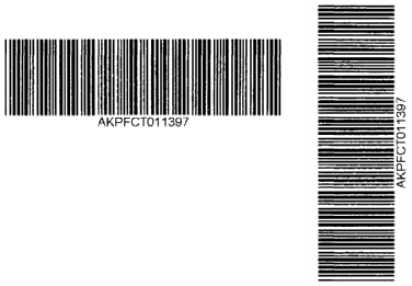
Barcodes are used to separate documents! This means you only have to attach 1 barcode to a document. If the document consists of several pages, you only have to stick a barcode to the first page.

A barcode consists of 2 parts:

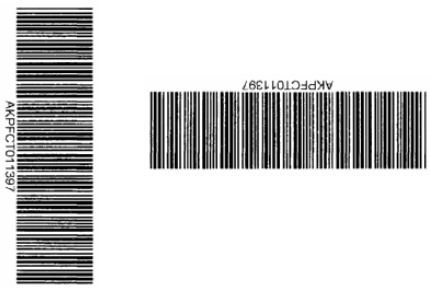
- Document type
- Unique ID-number (6 characters)

Example of a barcode

T
he barcodes can be attached in different directions, depending on you scanner configuration.



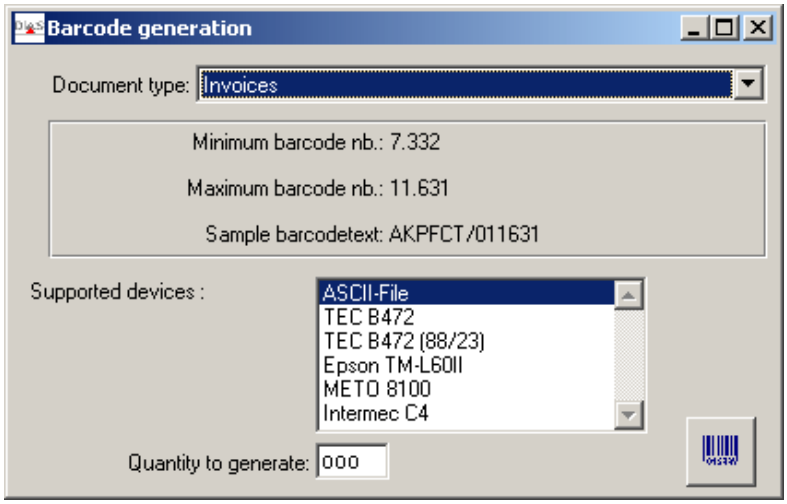
0° and 270° (standard)



90° and 180°: the barcodes won't be recognised (can be adapted)

Generating barcodes

- Click on Barcodes in the document management window.
  The window Barcode generation will appear:



- Document type: Select for witch document type you wish to generate barcodes.
- Supported devices: Select the Barcode printer
- Quantity to generate: fill in the number of barcodes you wish to generate
- Click to start printing the barcodes.

10. Workflow

10.1. Introduction

The electronic workflow in DIAS can be compared with the traditional flow of a paper document. When a DIAS user receives a document in his / her workflow, he can open the document and read it, relate it to other documents, approve and sign the document and add comments. Once the document is treated it will no longer be visible in his / her flow.

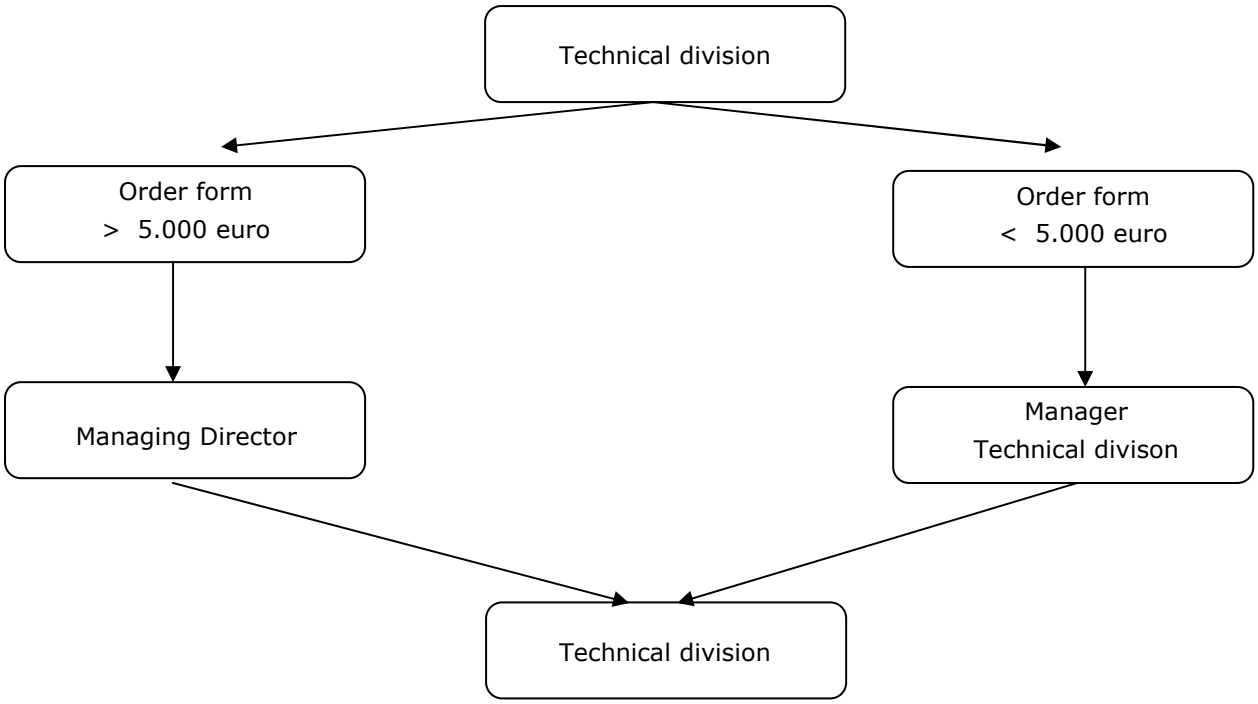
However there are some remarkable differences compared to the traditional flow of a paper document:

- You do not have to duplicate the documents in order to distribute them; one electronic copy is sufficient for all the users.
- There is no loss of time to distribute the documents; documents are treated faster and customers get helped out sooner.
- Documents can not get lost or stay somewhere unnoticed on a desk.

10.2. Serial and parallel workflow

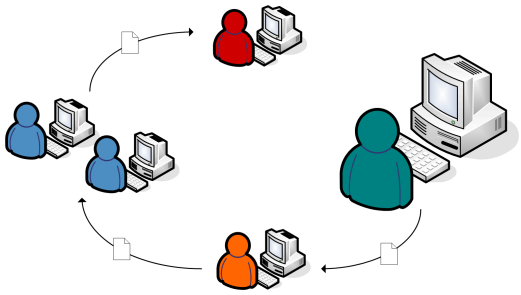
A workflow is the route of a document. It covers all the persons who have to view, consult, change, sign, approve … a document.

Example: In a company all the order forms exceeding 5.000 euro should be approved by the managing director before sending them to the technical division where the order is actually placed. Order forms not exceeding 5.000 euro have to be approved by the manager of the technical division.
In this example you can clearly distinguish 2 different flows: the flow of order forms exceeding 5.000 euro and another flow of order forms below 5.000 euro.



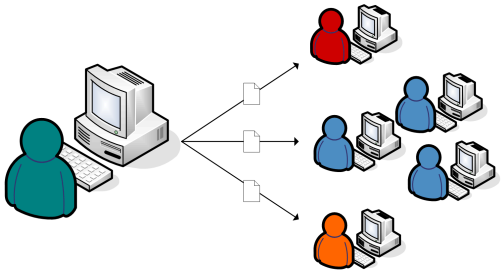
There are two methods to flow a document: serial and parallel.

Serial workflow



When using a serial flow the document can only be seen by one user or user group at the same time. The second addressee of the workflow can see the document only if the user prior to him released the document.
Example: an invoice first goes to the accountant. When the accountant entered the invoice into the books and made the necessary remarks he will release the document. Only then the next person of the flow will see the document in his / her flow.

Parallel workflow



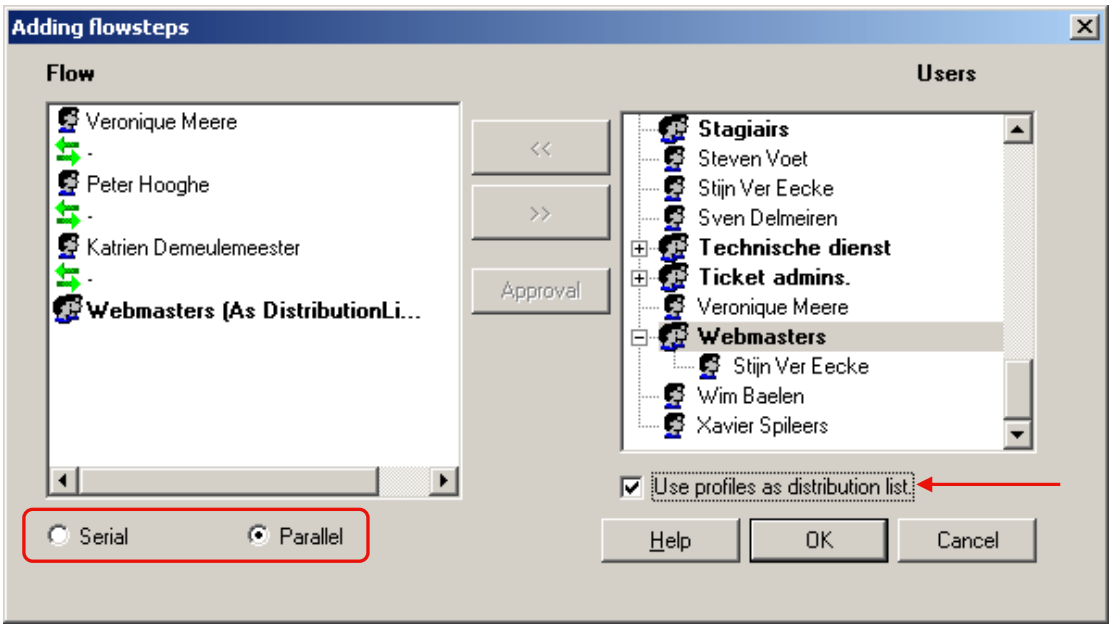
In a parallel workflow all the members of the flow can see the document in their flow at the same time. They can make remarks or release the document regardless of what the addressee prior to him did. If you send a document to 3 persons with a parallel flow they will all 3 see it at the same time.

Attention!

You can only adjust the flow type Serial or Parallel when adding the flow to the document. Once you've selected the flow type you CAN NOT change it anymore.

10.3. Add a workflow

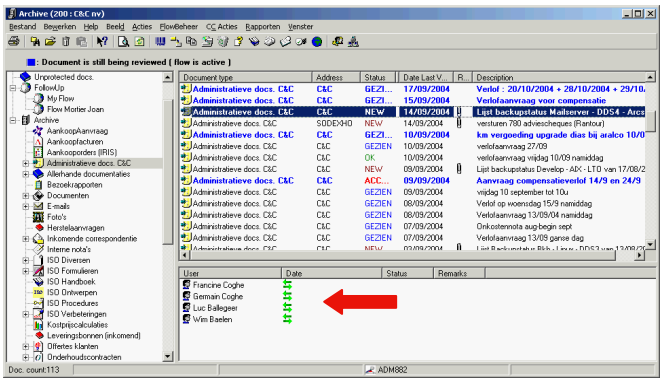
- Open the Document details window and click on Add persons to the flow .
- The Adding flow steps window will appear:



In the right window you see a list of all the DIAS users + regular font style) and DIAS user groups (+ bold font style) in alphabetical order.

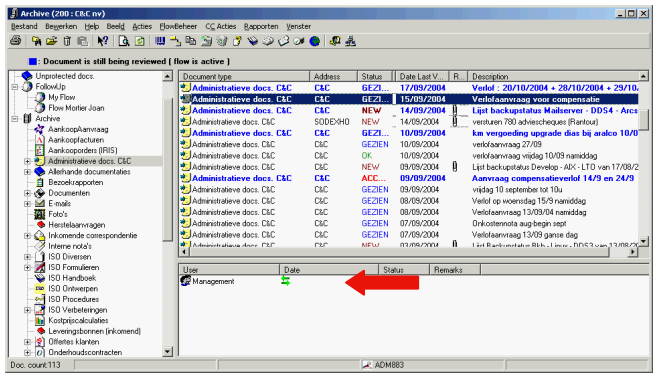
You can choose whether you would like to use the DIAS user group as distribution list or not. If you choose to send is as distribution list, each member of the user group receives the document in his or her workflow and has to deal with the document and release it. You can also choose not to use the distribution list. Then the document will be send to all the members of the group but only one person of the group has to deal with the document and release it. From the moment one person of the group releases the document it will disappear from the entire flow.

DIAS user group "Management" used as distribution list:



Every member of the user group has to deal with the document.

DIAS user group "management" not used as distribution list:



Only one member of the user group has to deal with the document.

You can move the users and / or user groups to whom you wish to send the document from the right window to the left window by clicking on << or by double clicking on the name. To remove users and / or user groups, you select them in the left window and click on >> or double click on the name.

Attention!

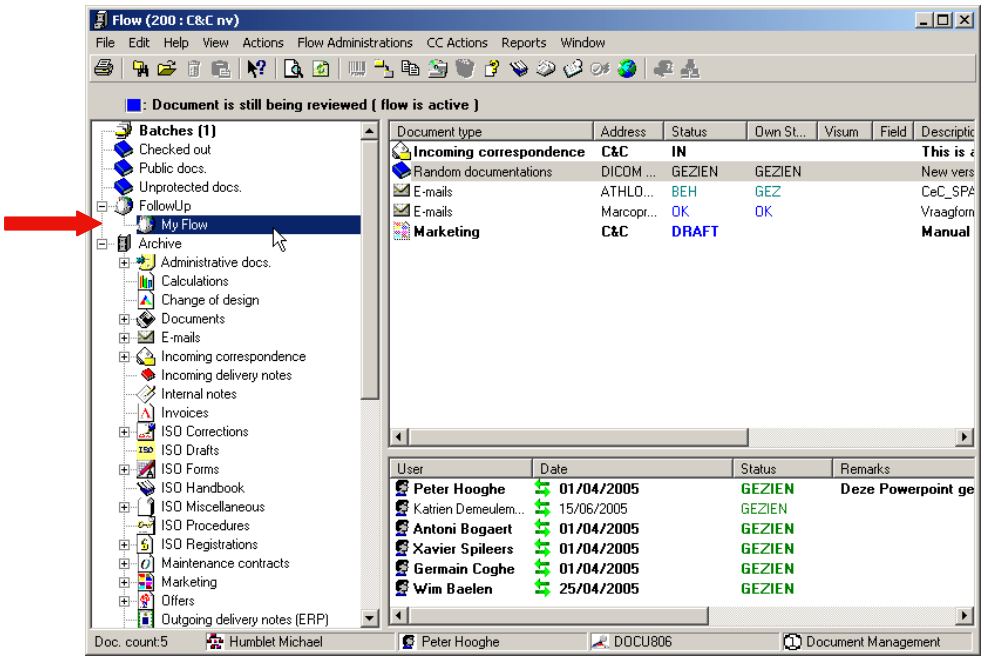
If the document you wish to flow has been flowed previously, you will see a list of the former addressees when opening the flow window. You can add persons to the flow list, but you can not remove users or user groups from the existing list or change the flow order of the existing list. The users who have released the document are shown in read.

The buttons Serial or Parallel determine the way of forwarding the flow. (as described in chapter 10.2).

With the button Approval you can define for each flow step if approval is required. You can find more information on the approval of documents in the section "Approve and Sign documents" on page 53.

10.4. The workflow window

When opening the document administration you standard get the workflow window. In this window you see an overview of all the documents which have to be treated by you. It is obvious that this window should contain as few documents as possible (this indicates that documents are being treated rapidly).



Attention!

When you work with multiple administrative files or dossiers: in the workflow window you only see the documents of the "active" administrative file (name of the administrative file is visible in the title bar). You can change the administrative file by clicking on Change dossier .

Workflow toolbar

On the toolbar in the workflow window you find the following actions:

Modify: to open the document details window where you can see the different flow steps (see page 17: document details).

Refresh: the workflow window automatically refreshes every xxx seconds. You can click on the refresh button to update the contents of your page manually.

Change dossier: select another administrative file. Remark: you can only select those dossiers for which you have access rights.

Out-of-office: in case of absence you can appoint a "successor" to follow-up the documents of your flow.

Follow-up: follow-up of telephone calls, internal notes and visit reports.

Planning: fix a task or appointment in your DIAS agenda related to this document.

Structure of the window

Each line in the workflow window corresponds with 1 document (a document can consist of several pages and / or several versions or revisions).

You find the following information:

- **Document type**: indicates which type of document it is (e-mail, invoice, fax, etc.).
- **Address**: company name or person to whom this document is related.
- **Status**: indicates the status of the document. The administrator assigns a priority level to each status. The status with the highest priority will be shown. Example: the status "finished" has a higher priority then "seen".
- **Own status**: indicates the status you have assigned to the document.
- **Date last modification**: date on which the document was modified for the last time in DIAS.
- **Visum**: this icon indicates if the document needs to be approved.
- **Related documents**: this icon indicates if there are other files related to this document.
- **Field**: The content of this field depends on the document type. For each document type you can indicate 1 UDP to appear here. For example: for the document type invoices you can see the invoice number in this field, for delivery notes this field can contain the order number.
- **Description**: short description or comment that was assigned to the document when registering it in DIAS.

Attention!

Some lines can have a red background colour; this indicates that there was a deadline for this document and the flow step exceeded this deadline.

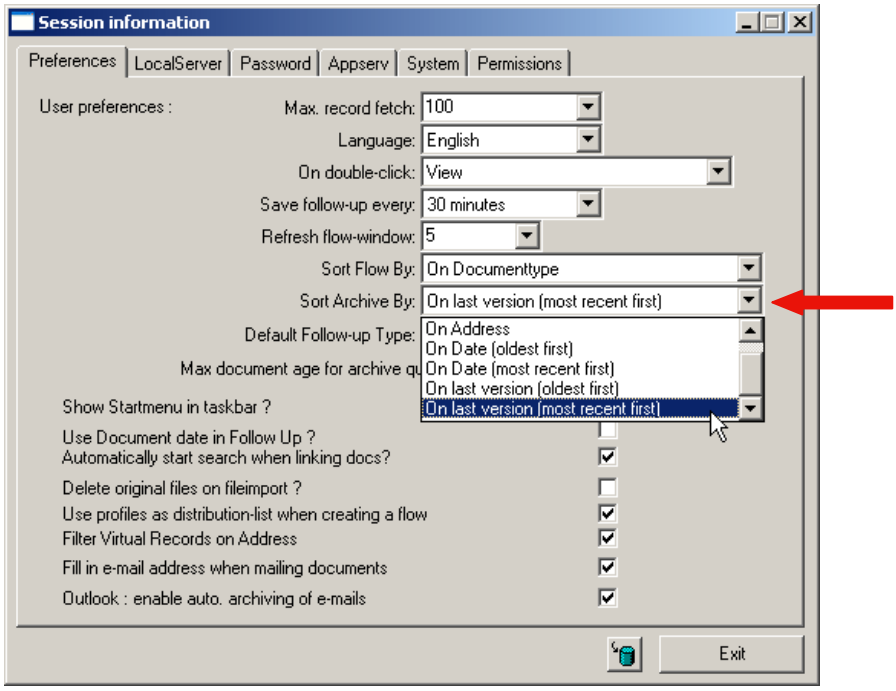
In the window below you see all the flow steps = all the persons who received the document in their flow. Each line corresponds with 1 person. The users marked in bold already released the document.

User	Date	Status	Remarks
Peter Hooghe	**01/04/2005**	**GEZIEN**	**Deze Powerpoint geeft een bee**
Katrien Demeulemeester	28/06/2005	GEZIEN	⚠
Antoni Bogaert	**01/04/2005**	**GEZIEN**	

Sorting order

You can sort the documents of your flow by clicking on the column header (company name, date, status, etc.). 1 click: ascending order - 2 clicks: descending order. When sorting by date, remember that this is the date when the document was inserted in DIAS; this is not always similar with the actual creation date of the document.

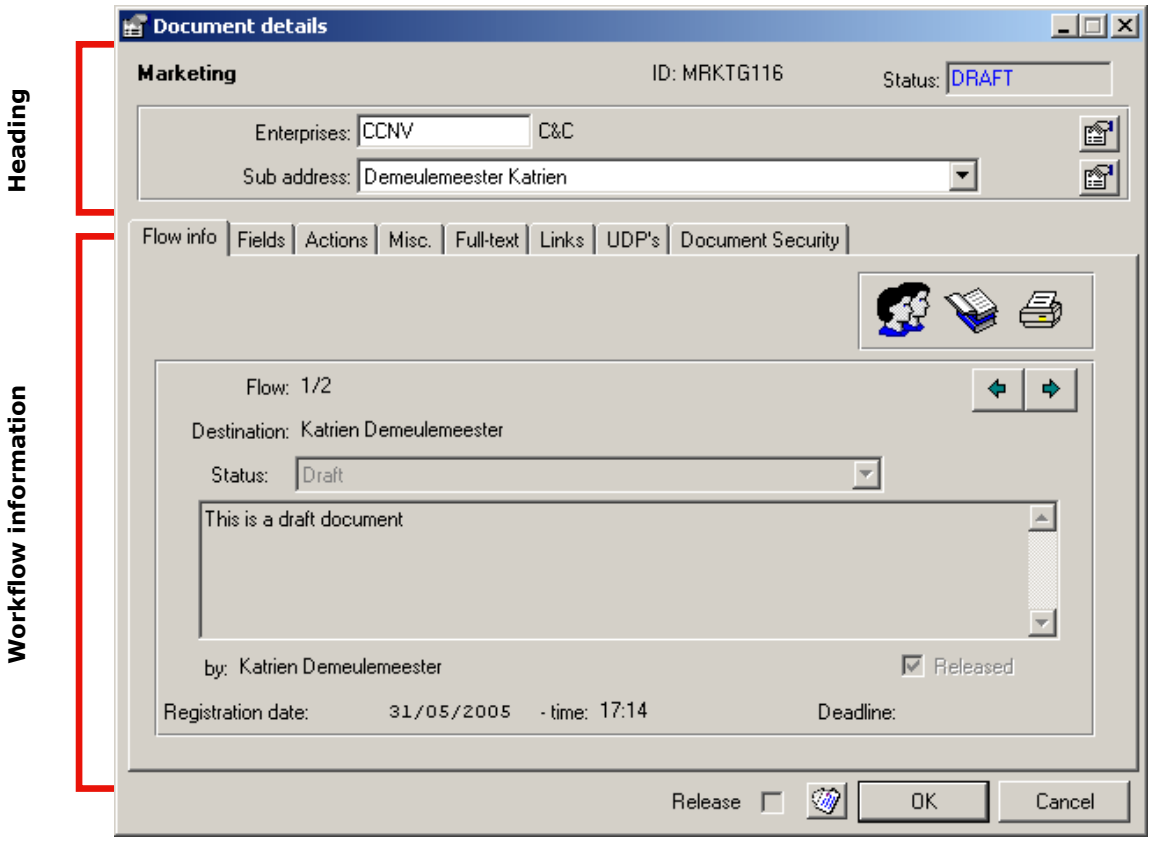
To set standard sorting preferences: Open the Session information window , select the standard sorting order of your choice (for workflow and archive):


Session information
Preferences
LocalServer
Password
Appserv
System
Permissions
User preferences :
Max. record fetch: 100
Language: English
On double-click: View
Save follow-up every: 30 minutes
Refresh flow-window: 5
Sort Flow By: On Documenttype
Sort Archive By: On last version (most recent first)
Default Follow-up Type:
On Address
On Date (oldest first)
On Date (most recent first)
On last version (oldest first)
On last version (most recent first)
Max document age for archive qu
Show Startmenu in taskbar ?
Use Document date in Follow Up ?
Automatically start search when linking docs?
Delete original files on fileimport ?
Use profiles as distribution-list when creating a flow
Filter Virtual Records on Address
Fill in e-mail address when mailing documents
Outlook : enable auto. archiving of e-mails
Exit

10.5. Workflow detail window

- To open the workflow detail window select the document and click right. Choose open.
  (Or click in the toolbar)

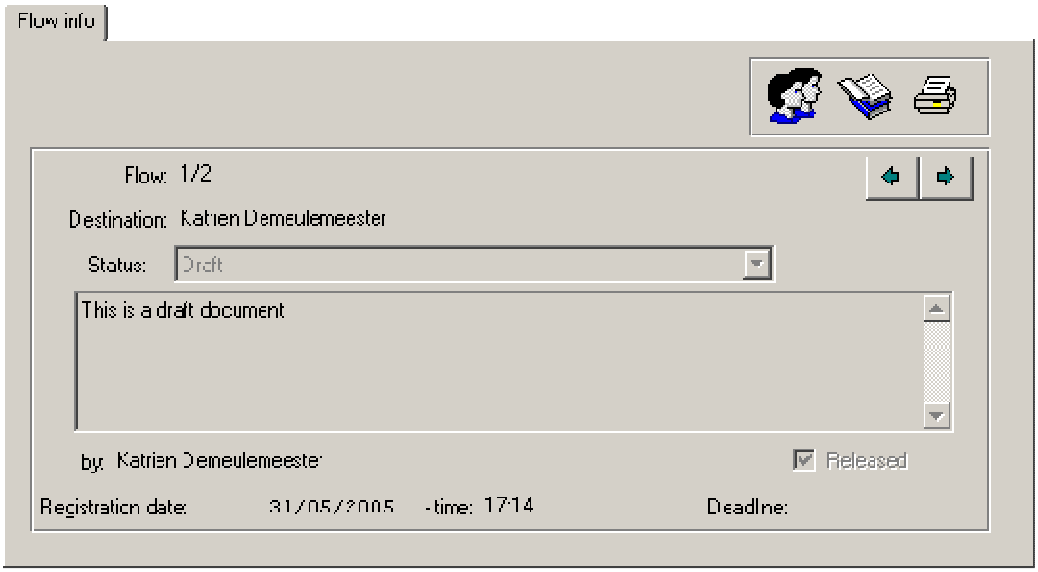
- The document details window opens:



In the heading you find some general details of the document:

- **Enterprises**: name of the company related to this document (customer, supplier, etc.).
- **Sub address**: contact person or department of the company.
- **Status**: general status of the document (status with the highest priority).

On the Flow info tab you find information regarding the different flow steps a document has passed or still has to pass.



Fields

- **Flow**: when opening the document details you standard see the first flow step. To move to the next or previous flow steps you click on ◀ or ▶ . On the left side you can see which flow step is shown (1/2) and on the right side how many flow steps there are in total (1/2). Understandably you can not modify the flow information of other users.
- **Destination**: the person to whom the document is addressed
- **Status**: the status given to the document by the addressee
- **Comments**: the comments or remarks of the addressee
- **By**: name of the person who released the document
- **Released**: if this box is checked the document is not longer in the flow of the addressee.
- **Registration date**: date when the addressee released the document
- **Registration time**: time when the addressee released the document
- **Deadline**: if someone determined a deadline for the workflow of the document this date will be shown here. Thanks to the deadline you can see if the addressee treated the document within the time limit.

Buttons

View document: click on the button to open the document in its original application (ex. a Word document will be opened in Microsoft word).

Add persons to the flow: add a workflow to the document = forward the document to one or several users.

See related document: see the files related to the document or create new document relations (ex. relate an invoice to the order form).

Print the document: print the document on the standard printer.

11. Approve and sign documents in DIAS

11.1. Approve documents

Sometimes it can be necessary to approve a document before releasing it.
This can be done in two different ways:

- Standard flow
- Manual flow

Standard flow

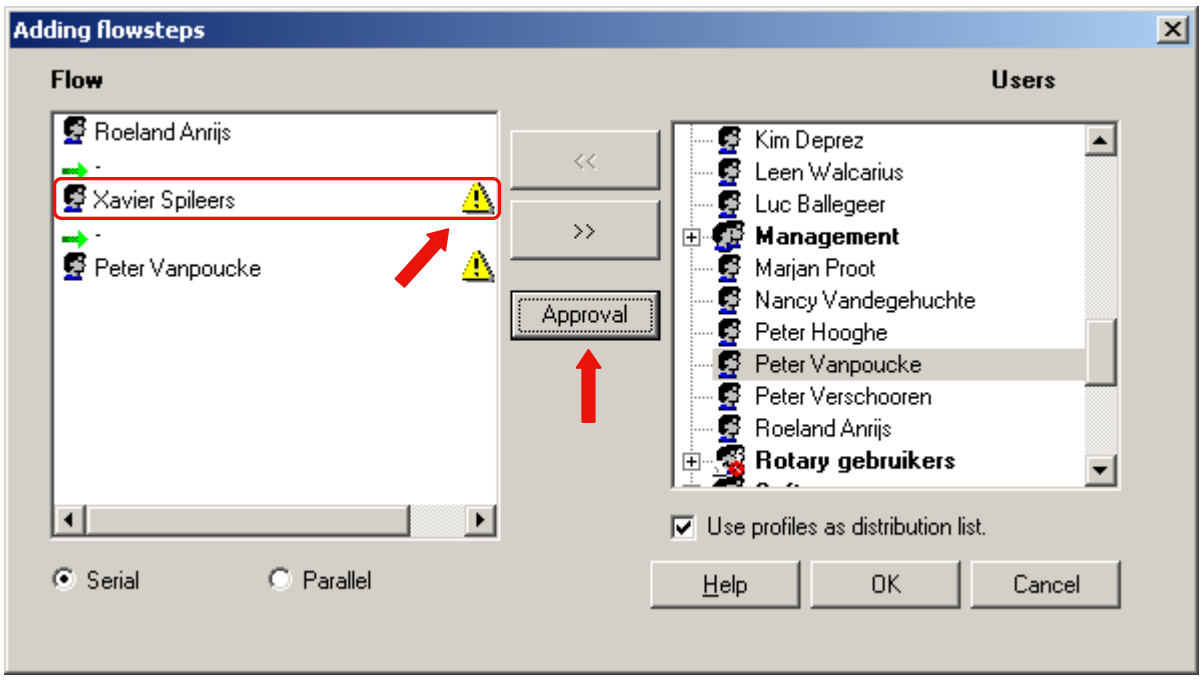
If a certain document type **ALWAYS** has to follow the same flow, a standard flow can be made. This means that for these documents you never need to add a manual flow. Example: an invoice always has to be flowed to the accountant, afterwards to the management team and finally again to the accountant.
Standard flows are assigned when scanning or importing a document. The flow is automatically attached, without interference of the user. Defining the standard flows is a responsibility of the administrator.

Manual flow

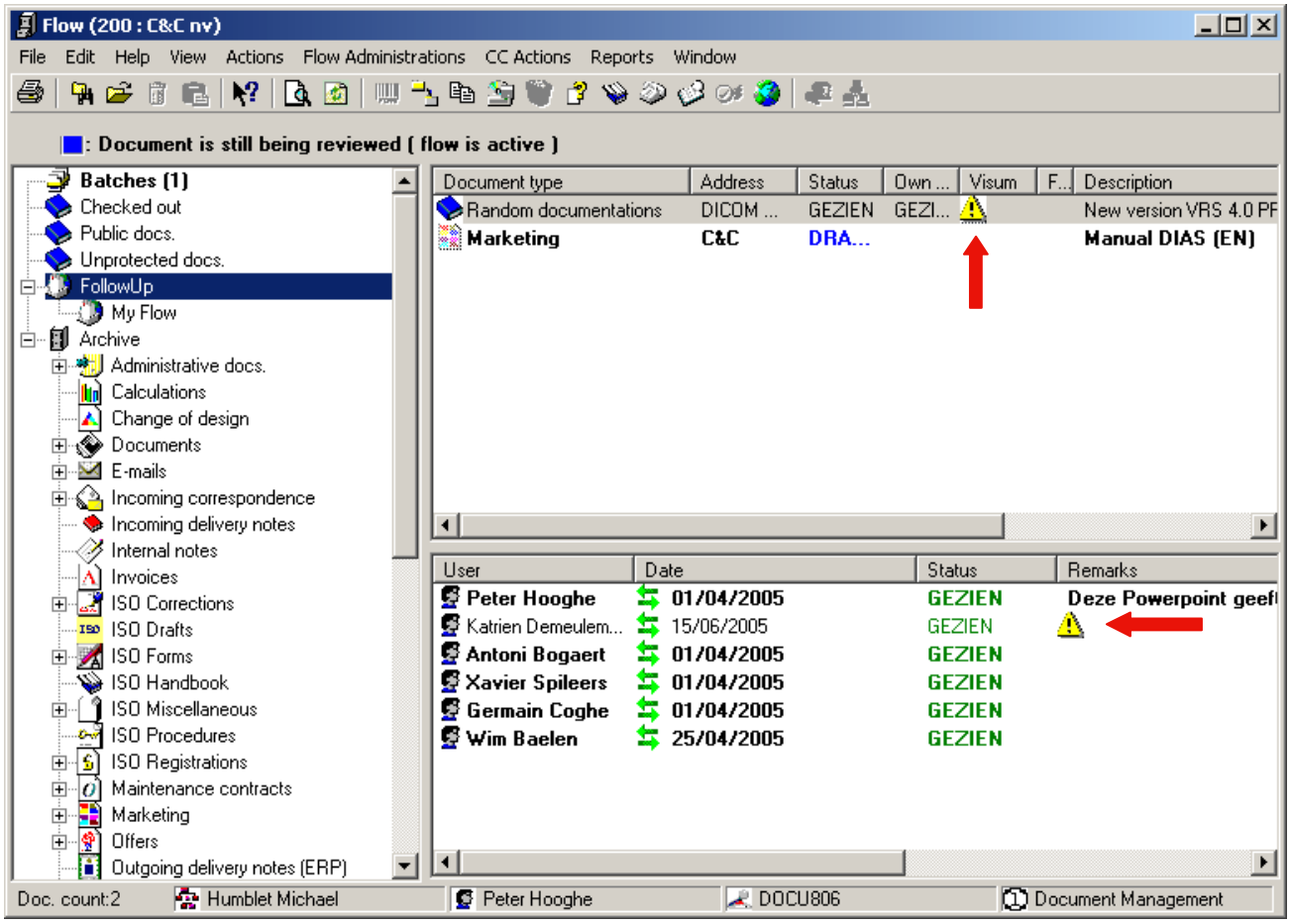
If you use a manual flow you have the possibility to assign each document a different flow. For every flow step you can indicate if approval is necessary.
As long as the document is not approved, the user in question will not be able to release the document.

When one or several users or user groups have to approve the document:

- Select the first person who has to approve the document
- Click on Approval. Next to their name this icon will appear:



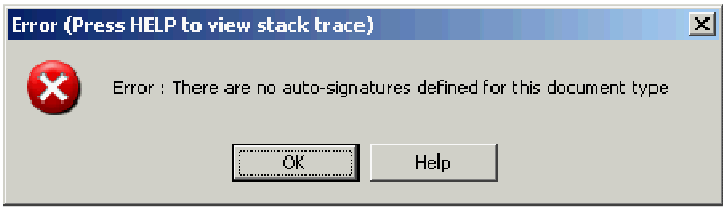
The indicated person cannot release the document before approving it.
The user sees the ⚠ icon in his / her flow list. It is immediately clear which documents need approval.



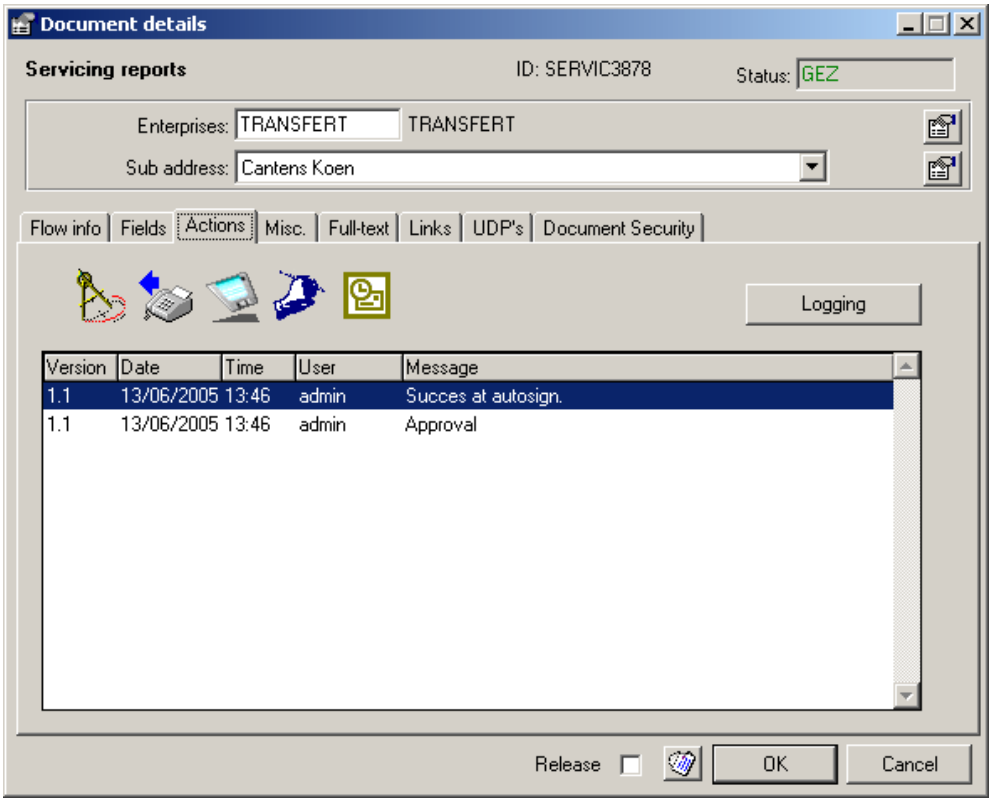
Approve a document

- Open the "Document Details" and click on Signature

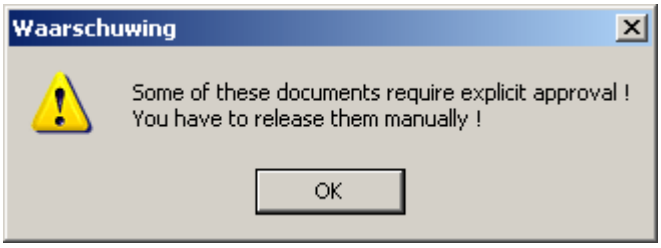
  If there is no express request to sign the document (or you do not have the authority to sign the document), still you can use this button to place your signature. The following error will appear, but your approval will be registered in the log.



- After approving the document you can release it.



If the user tries to release the document without approving it first, he / she will get the following error:



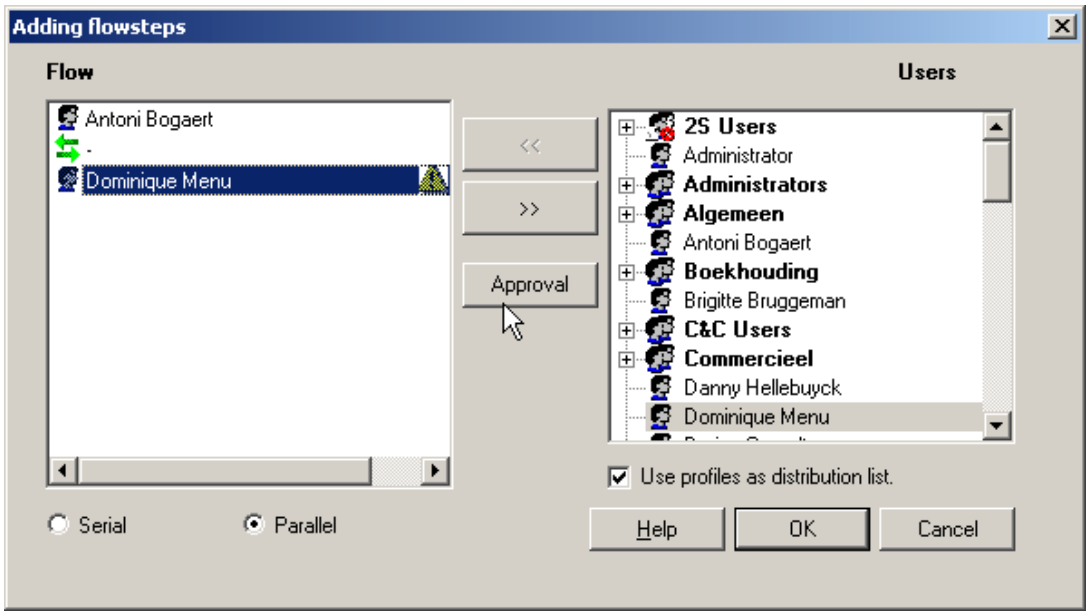
Attention!

Every user can flow documents to other users and thus request approval of a document. This is only possible for users or user groups that you add to the flow.

Disapprove a document

If the user DISAPPROVES the document and therefore refuses to sign it, he / she has to remove the approval icon ( ) in order to release the document.

- Click on to add a flow step.
- Select your name and click on Approval
- The icon will disappear and you can release the document (without approval)



Conclusion:

All these actions force the user to act consciously:

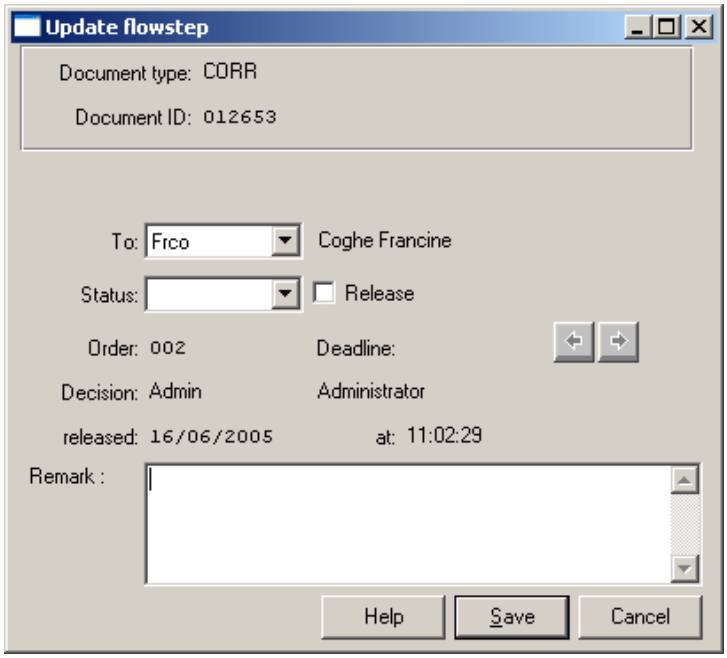
- Or the document will be approved by clicking on the Signature
- Or the document will be disapproved by removing the icon.

Only if the user carries out one of these actions, he / she can release the document.

Control of the flow

If for any reason you wish to intervene in the workflow process (ex. If the workflow process is delayed due to someone's absence), the Administrator can release the document instead of the user.

- Select the document
- Double click on the flow step you wish to change
- The window "Update flowstep" will appear and the Administrator can carry out the necessary changes.



- To remove a flow step, click right on the flow step and select "Delete".

Attention!

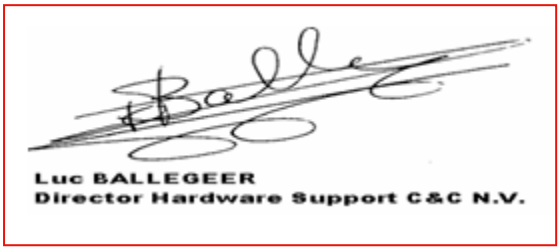
When the Administrator releases a document instead of the user this will be registered in the log.

11.2. Sign documents

In DIAS you can automatically place your signature on digital documents. If it concerns a text document, a character string should indicate where the signature has to be positioned. If it concerns a graphical file, X-Y coordinates will determine the place of the signature.
The Administrator decides who can sign which document type and where the signature will be positioned.

The character string to indicate the signature is usually: **[** "**SIGN_**" followed by the initials of the person in question**]**

- Open the document details of the document you which to sign
- Click in the Action tab on Signature
- DIAS will open the document and look for the character string that indicates where your signature should be placed.
- The signature will be inserted.



- Now you can release the document.
  Your approval will also be registered in the log.

12. Versioning and automatic versioning

12.1. General principle

With DIAS you can create and archive different versions of one document. You can even compare different versions with one another.

There are two possibilities:

Use Versioning:

If you wish to preserve the original file without modifications, you make use of versioning. The document will be shown in "read-only" modus. If you wish to modify the document, you have to take it out of the archive (="check out") in order to create a new revision or version. Until you place the document back in the archive (="check in") no one else will be able to make changes to the document.
The original version and other versions or revisions can be consulted in the versioning window.

What is the difference between a revision and a version? In general you create a new version if you make radical changes to the contents of the document. For smaller changes (ex. correction of mistakes) you better use a revision.

Attention!

Afterwards you can merge revisions in order to save disk storage.

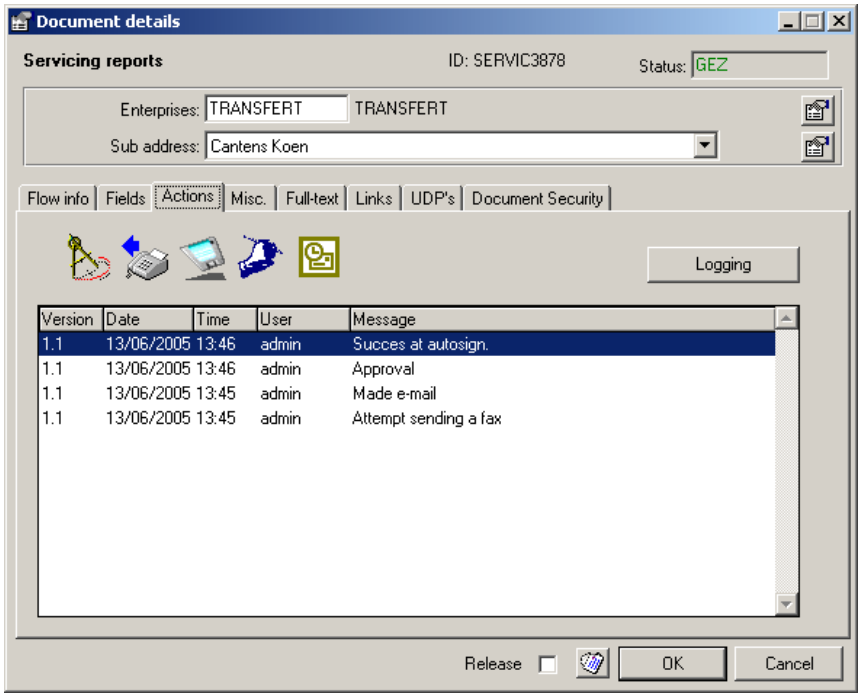
Use Automatic Versioning:

If you wish to modify the document frequently, it is recommended to use Automatic Versioning. Everyone who opens the document can make changes. The original document will always be replaced and there will be no history of previous changes.

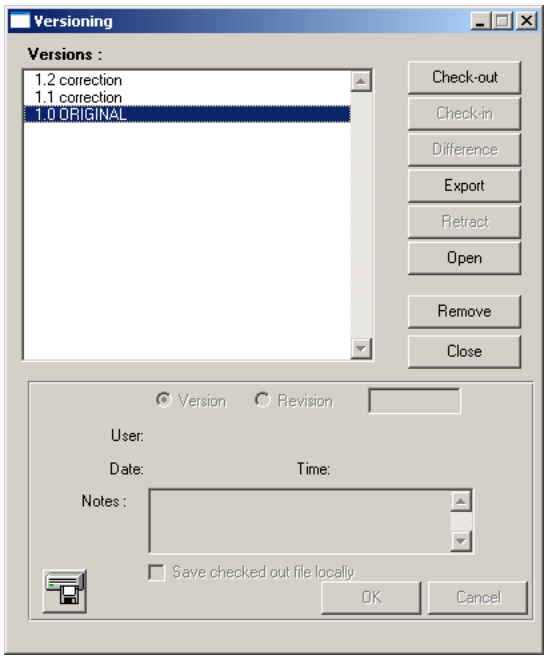
12.2. Versioning

Check-out

- Select the tab Actions in the Document Details window



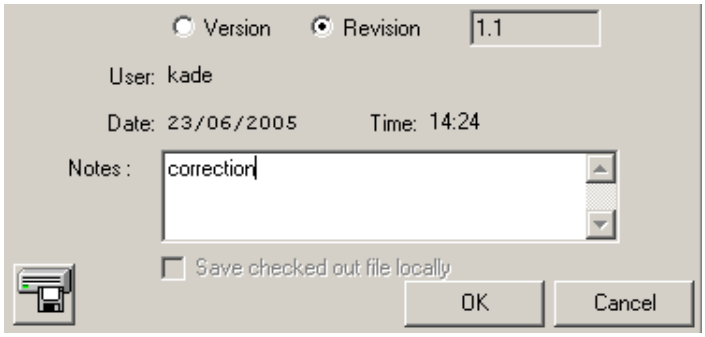
- Select "Start Versioning"
  If you can't select this pictogram this means versioning is not allowed for that specific document type.
  The Versioning window will open:



- On the right site you see all the actions that can be performed with a document:
  - Check-out: take the document from the archive to make changes
  - Check-in: place the document back in the archive in "read-only" modus. Other users can now see your changes.
  - Difference: see what the differences are between several versions or revision
  - Export: save the selected versions / revisions on another location
  - Retract: merge unnecessary revisions in order to save disk storage and keep the versioning window well-organized.
  - Open: open the selected version / revision
  - Remove: remove the selected versions / revisions (only possibly for versions / revisions that you own or by the administrator)
  - Close: close the Versioning window

- In the left site of the window you see "1.0 ORIGINAL", this corresponds with the original document.
- Click on

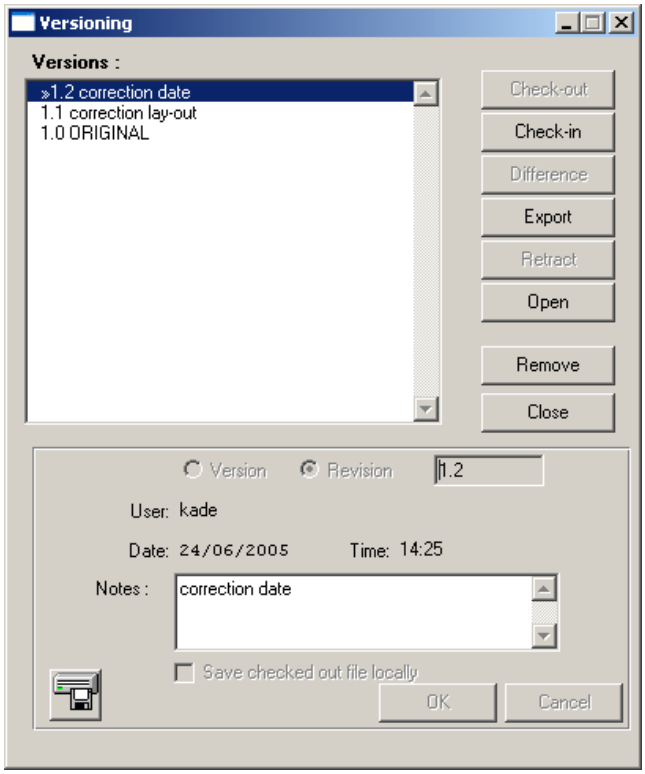
- The detail window below will be activated. You can choose whether you would like to make a new version or a revision:



Version ⇔ Revision: make a new version if you wish to change the document radically. Revisions are used for smaller modifications (ex. correcting mistakes).

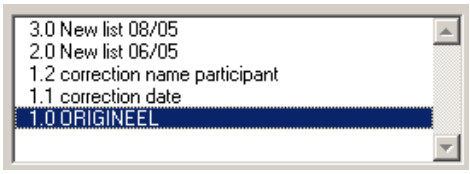
- Notes: mention here a short description of the changes you wish to make (ex. modify prices).
- Save checked out file locally: if you wish to save the checked-out version on your local disk.
- Import a version / revision: click here to import an existing external file as new version / revision.
- Click OK to create the new version / revision.
- DIAS will open a copy of the original document in the application in which it was initially created. In the title bar you see that the name of the document has changed (ex. 23281.doc). You can now modify the document and save it afterwards.

- In the Versioning window the new version / revision is marked with » . As long as you do not check-in the document you will be the only person who is able to see this new version / revision (to avoid that other users can see the "incomplete" document).



A new **version** is noticeable by the figure **left** of the point. When creating a new version this number will increase. Example: if the last version was 2.0, the new version will be 3.0

A new **revision** is noticeable by the figure **right** of the point. When creating a new version this number will increase. Example: if the last revision was 2.1, the new revision will be 2.2



Check-in

When you have completed the new version or revision and you wish to make your changes available for the other users, you have to "check-in" the document.

- Click on Check-in .
- The » sign will disappear and other users can see the new version / revision.
- To open a previous version / revision you select the document and click Open

Attention!

As long as a previous version or revision is not checked-in, no one can check-out the original document to create another new version or revision.
Besides the person who has checked-out the document, also the administrator can check-in a new version or revision.

Merging revisions

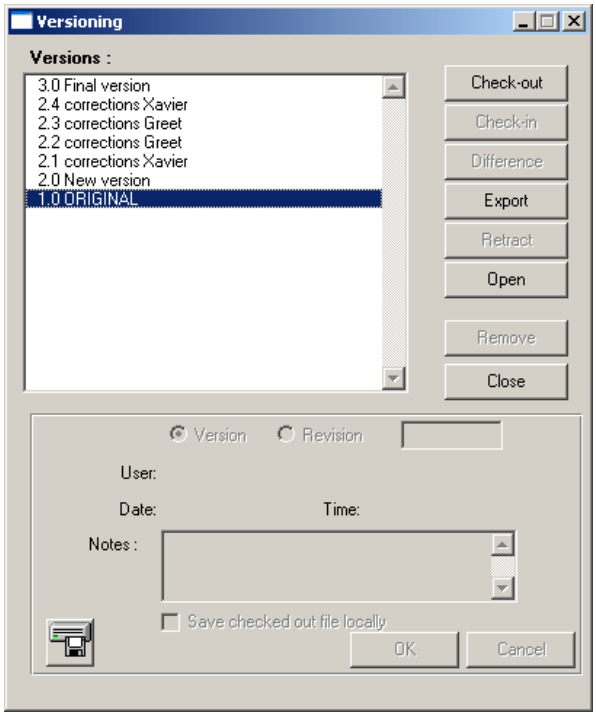
To keep the versioning well-organized and save disk storage, you can remove or merge unnecessary revisions.
When merging revisions a number of revisions will be removed and the first appointed revision will be replaced by the last one. In the log you can see which revisions were merged, when and by whom.

Attention!

You can only merge revisions, no versions!
It is also possible to merge several revisions that belong to different versions.

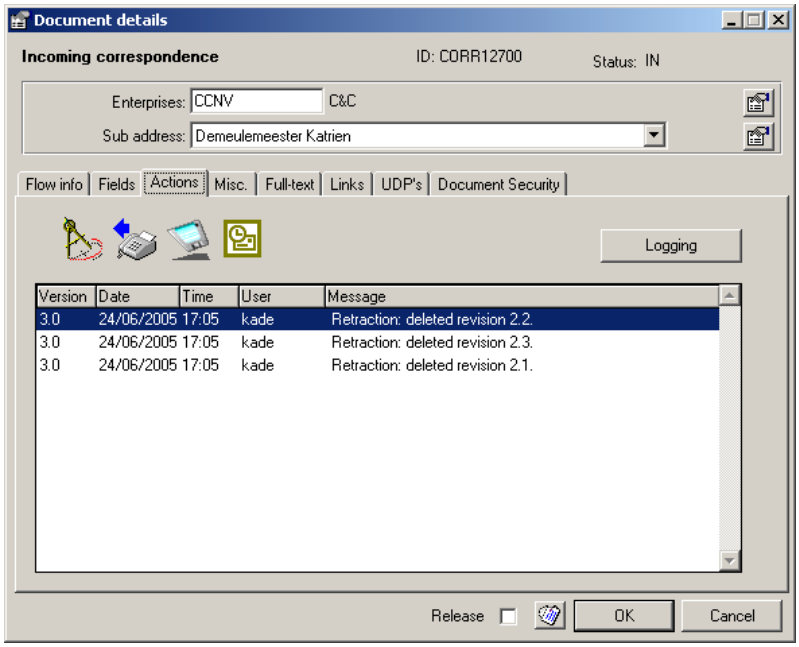
Example:

Document with several versions and revisions:



As user Xavier does not longer need the document, he can decide to merge the revisions 2.1 and 2.4

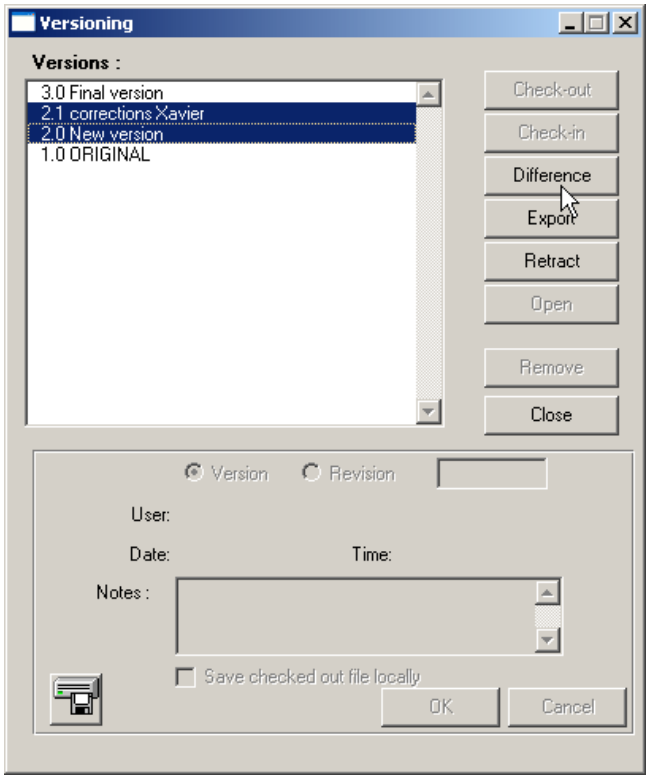
- Select the lines 2.1 till 2.4
- Click on Retract
  Version 2.4 will now be version 2.1
- In the log you see which revisions were merged, when and by whom.



Difference between Versions and Revisions

With this option you can detect all the visual differences between several version / revisions (at least 2), provided that the mother application (application used to open the document) supports this possibility. The number of versions / revisions which can be compared also depends on the possibilities of the mother application.

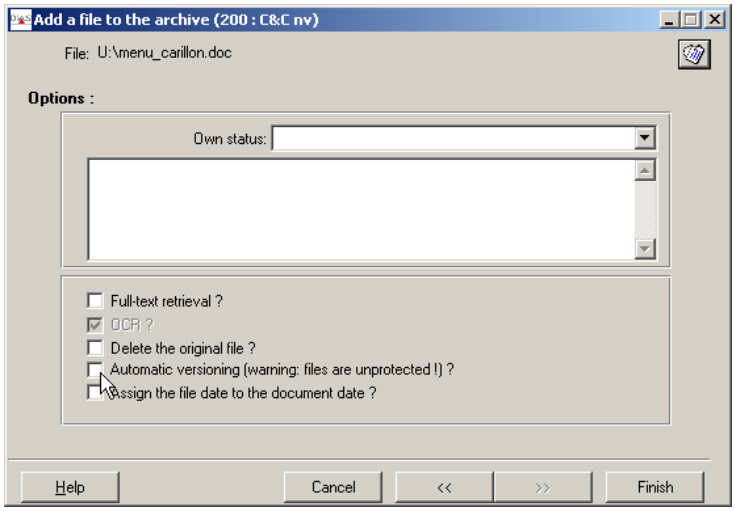
- Select in the Versioning window the versions / revisions you wish to compare.
- Click on Difference to see the modifications.



12.3. Automatic Versioning

Versioning is too time-consuming if documents need to be modified frequently. For those documents you better use Automatic Versioning. Everyone who opens the document can modify it and save his / her changes. Each time the original file will be replace by the most recent version and only the last version stays available.

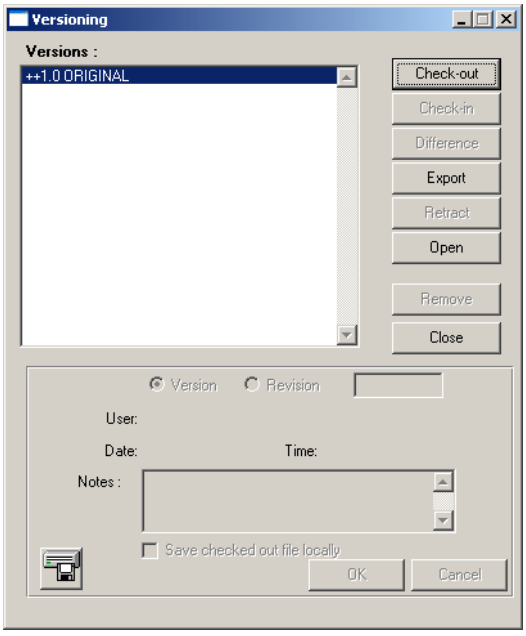
- In the window "Add a file to the archive" you choose for Automatic Versioning.



Attention!

The document is unprotected and can be modified by everyone. The changes are not registered in the log and the modifications can also not be rectified afterwards.

- The "++ 1.0 ORIGINAL" indicates if automatic versioning is applicable on the document.



- The documents that use Automatic Versioning are easy to distinguish in the archive by the lighter coloured pictogram.

Internal notes C&C 01/06/2005 01/06/2005 nog eens
ISO Registrations C&C 01/06/2005 01/06/2005 Lijst back
Sales Adminstra... C&C 01/06/2005 01/06/2005 Hotlist a
Visit reports C&C GEZ 01/06/2005 01/06/2005 urenverar
Internal notes C&C 01/06/2005 01/06/2005 lezen e-m
Technical Docs C&C 22/12/2003 01/06/2005 Cisco 26(

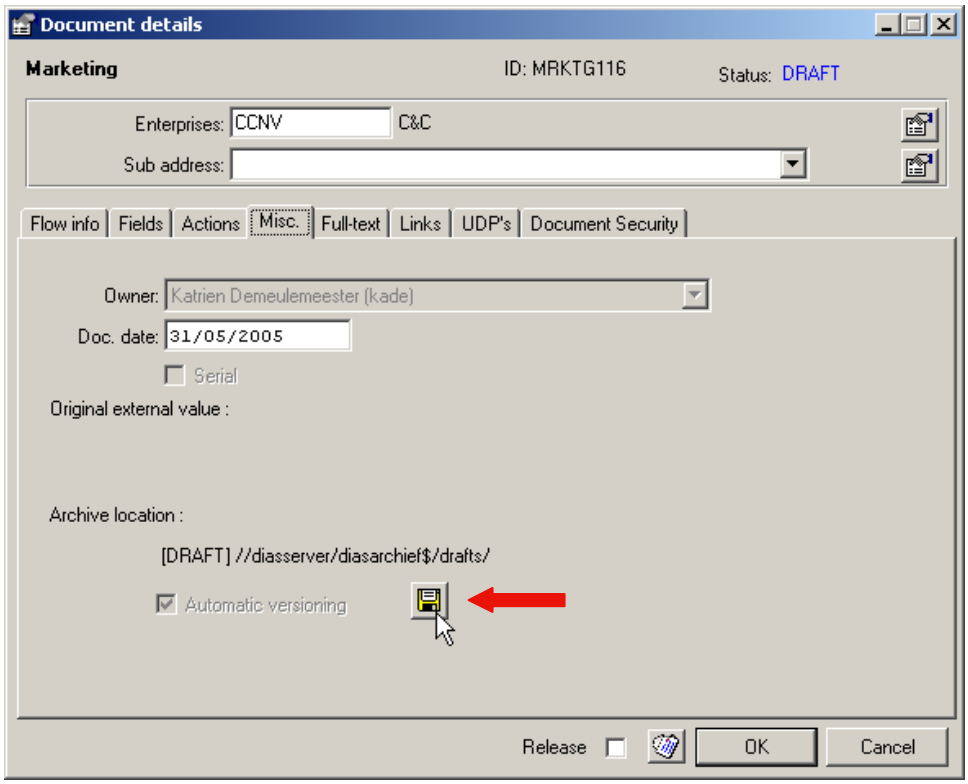
- You can also see the difference between documents using Versioning and those using Automatic Versioning in the title bar:

  - Documents which can only be modified using Versioning are opened in "Read-Only" mode:

  - Documents using Automatic Versioning do not have the Read-Only notice as they can be overwritten.

- Document using Automatic Versioning can not be opened with Versioning (you can not save different versions / revisions of the document). If you wish to do so, you have to switch off the Automatic Versionig option.

  - Open the Document Details and select the tab Misc.



  - Click on

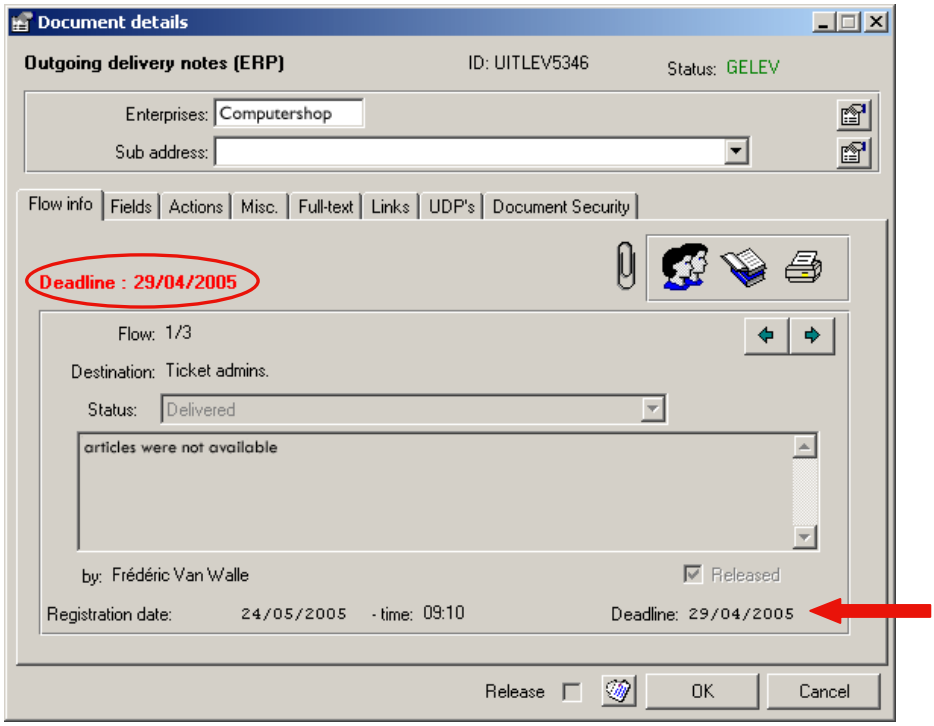
    Henceforth the original file can not be overwritten and if someone wishes to modify the document this can only to be done with Versioning. You will also see that the " ++ " sign disappeared in the Versioning window.

13. Deadlines

In DIAS it is possible to define deadlines. With a deadline you set a limited time during which the document must be treated. Deadlines can only be used for predefined workflows. Example: the workflow of an order confirmation can maximum take 4 days.
There are no fixed 'treatment codes', therefore we use the status code to indicate if a document was treated or not. With the deadline you define when the addressees should have assigned a specific status to the document.

Example:
When a document is added to DIAS it gets the status "IN". The deadline: within 3 days the document should have the status "OK".
The time limit will be divided between the members of the flow. If for example the document has to be treated by 2 persons person A can have two days and person B one day to treat the document.

You can see the maximum date of a document in the document details window on the tab "flow info":



- If the document was treated within the deadline, the deadline will be shown in **black**
- If the document was not treated within the deadline, the deadline will be shown in **red**.

The information concerning deadlines is registered in DIAS. This means that you will always be able to see if a document had a deadline and if it was treated within time.

Attention!

Users can not change the deadline, the administrator can. User may well ask the administrator to postpone the deadline.

14. Absence administration

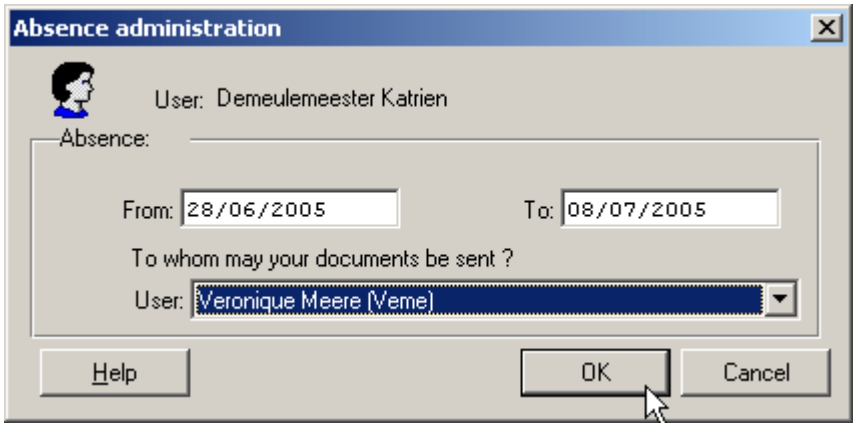
In case of absence you can appoint a "successor" to follow-up the documents of your workflow. This person will see all your documents in his / her own flow and this person can comment or release documents in your place.

Attention!

All documents that were not released by your "successor" will get back in your flow the moment you log in to DIAS. In the documents that were treated by you "successor" it will be mentioned that he / she dealt with the document in your place.

To open the Absence administration:

- Open document administration and click on the out-of-office icon
- The following window will appear:



- Enter the period that you will be absent. You can also leave the "To"-field empty, than you are absent until you log-in again.
- In the user field you select one person who can manage your documents during your absence. You can not select a user group.

Attention!

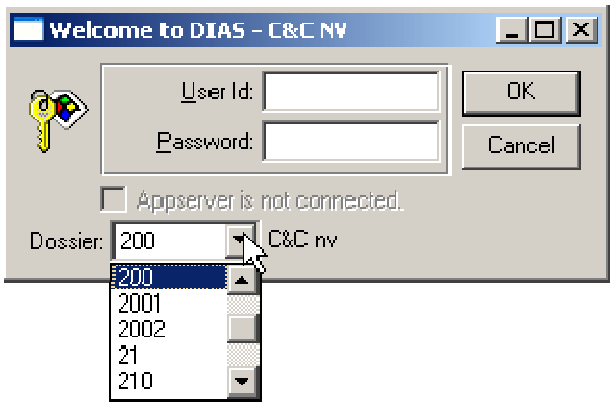
You can not select a user who is absent at that same moment. It is also not possible to use the out-of-office function if you are already receiving the flow from another user.

- When you log-in while being registered absent, DIAS will ask if you wish to stop the absence management and register yourself again as being present.

15. Dossier / file management

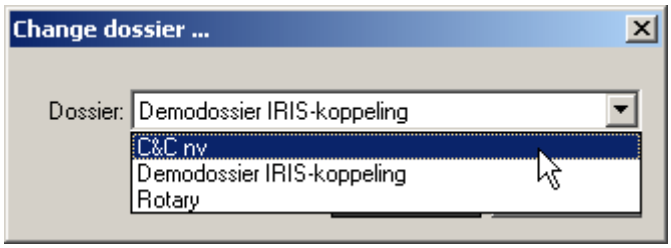
In DIAS documents are managed in dossiers or administrative files. Documents can only belong to one dossier (unless you enter them several times) and only those persons who have the required access rights will be able to see the documents of the dossier in question.

When logging-in on DIAS you are asked to select the dossier you wish to open:



You will only see the documents and workflow belonging to this specific dossier.

If you wish to see another dossier select in the menu: Actions → Change dossier or you click on in the toolbar (you will only see those dossiers for which you have the required access rights).

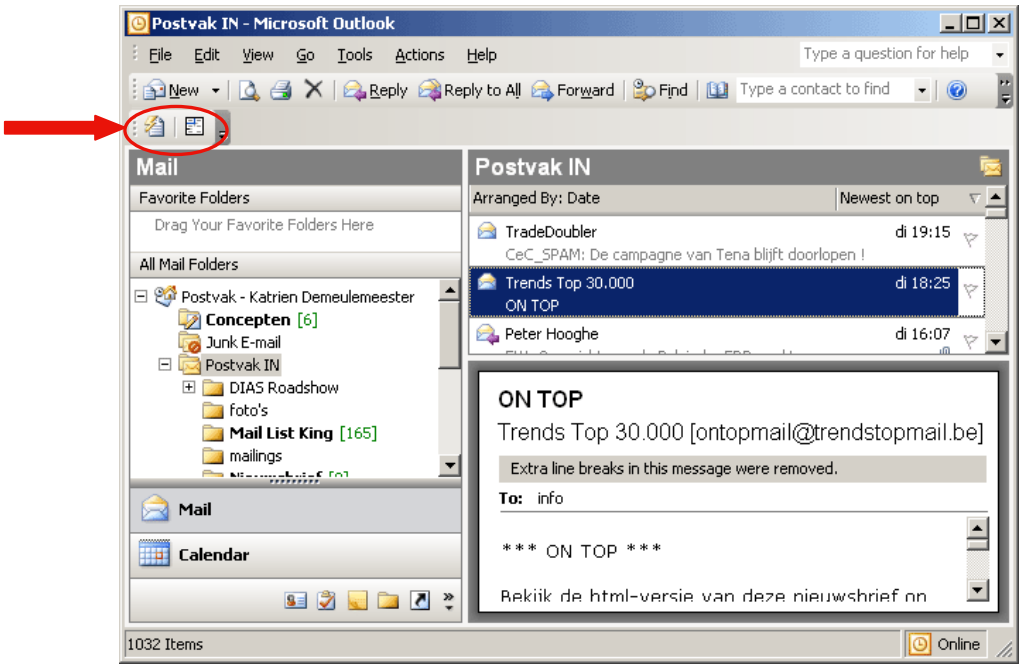


The access rights are managed by the administrator. Only this person has the right to create or modify these settings.

16. E-mail integration

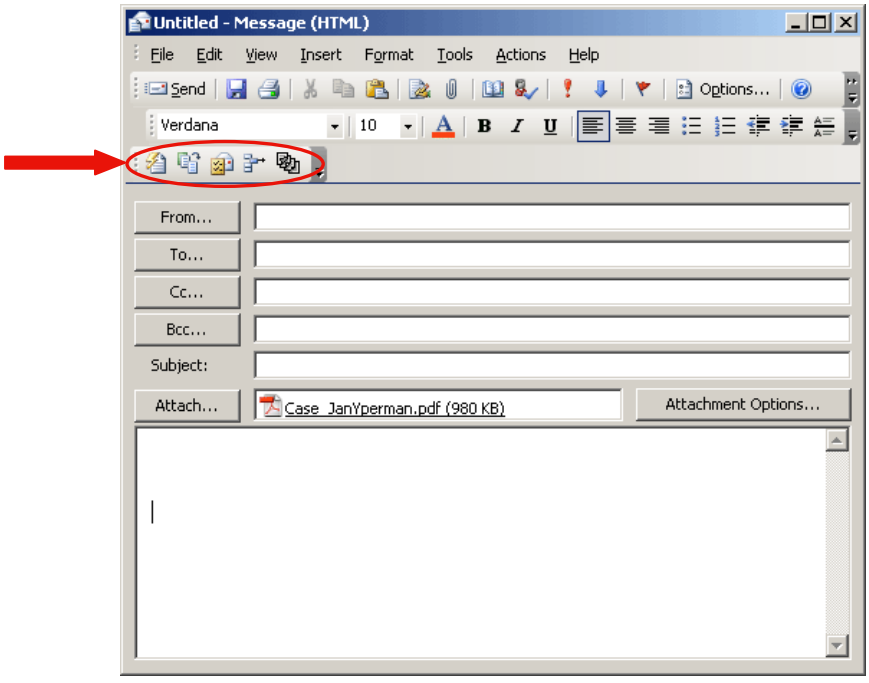
16.1. E-mail toolbar

With the DIAS toolbars you can easily integrate all the useful e-mails in your digital archive.



Submit to DIAS: click here to import the selected e-mail in the DIAS archive.

Neg. and Pos. list: you can make a list of addresses whose e-mails you always wish to import automatically and those you never wish to import. More information on page 74.



Submit to DIAS: click here to import the selected e-mail in the DIAS archive

Select DIAS document(s) to add as attachment(s): click here to open the archive and search the document you wish to add in attachment. Double click on the document line and it will be added as attachment to your e-mail.

Fetch an e-mail address from DIAS: click here to open the DIAS address book and select (by double clicking) the addressee(s).

Submit the attachments to DIAS: instead of submitting a file to DIAS, you can click here to import the attachment of your e-mail in DIAS. (see page 31: Import files in DIAS)

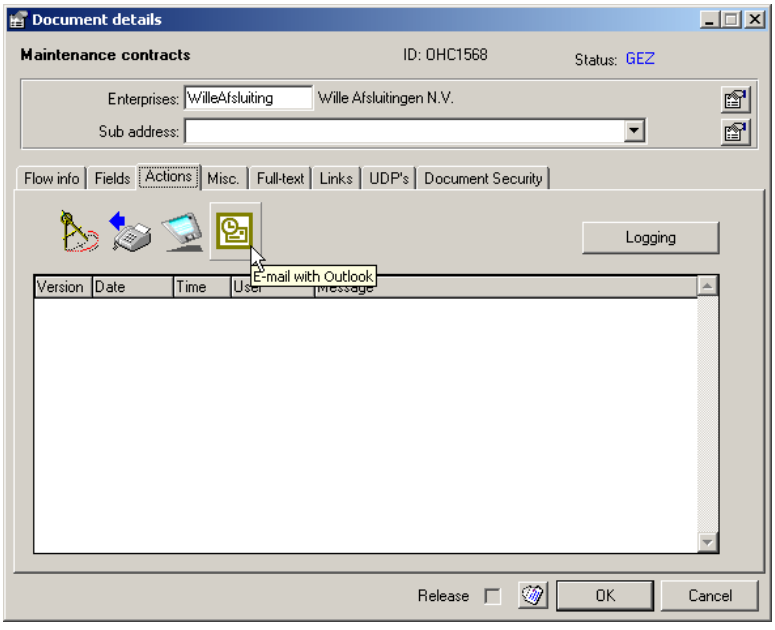
Submit the attachments to DIAS versioning: click here to import the attachment of your e-mail as a new version of an existing document archived in DIAS.

16.2. Sending a file with MS-Outlook

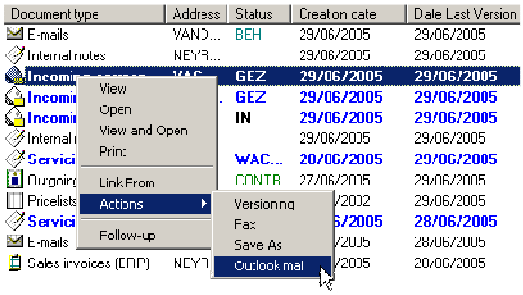
To e-mail a document archived in DIAS, you follow the next steps:

- Find the document you wish e-mail in the DIAS archive and open the Document Details window.

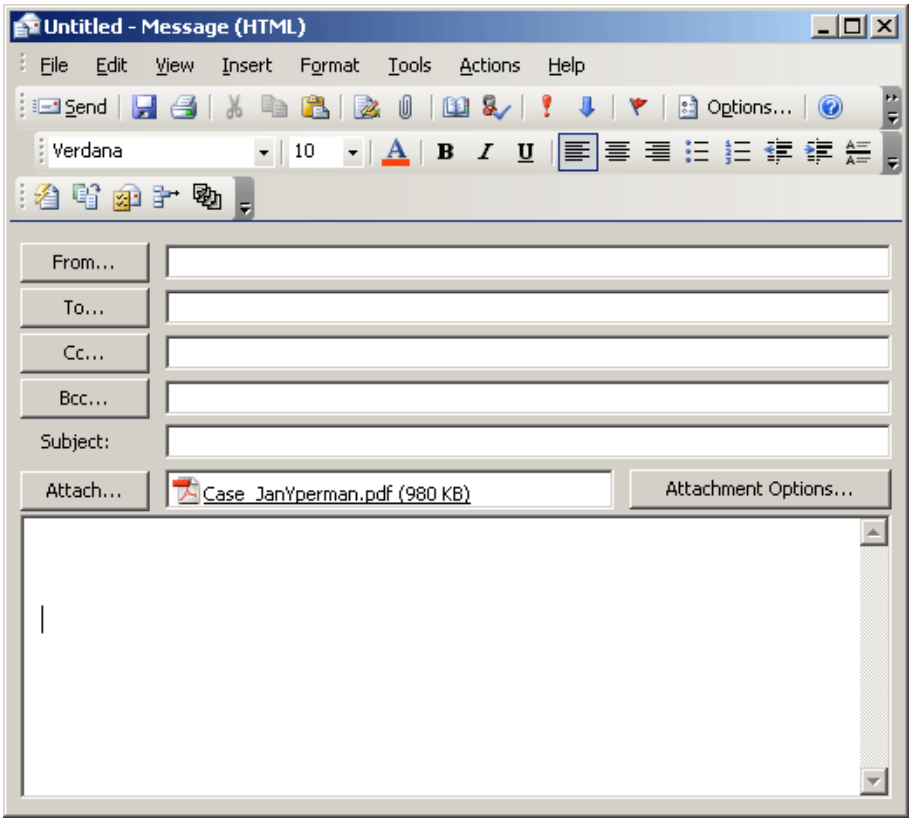
- Select the tab Actions and click on E-mail with Outlook



Or you can also select the document, click right and choose Actions → Outlook mail

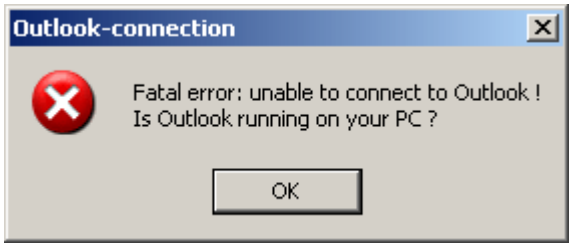


- DIAS automatically creates an e-mail with your selected document in attachment. You only have to fill in the subject and the text of your e-mail. You can insert the e-mail address of the addressee from the DIAS address book.

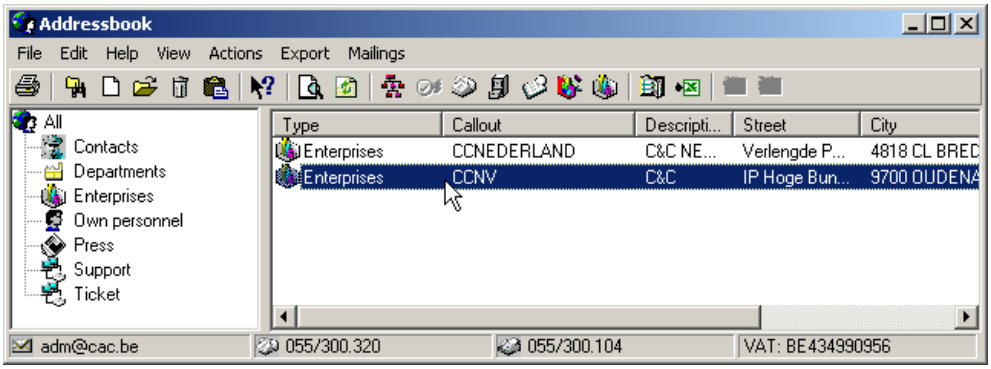


Attention!

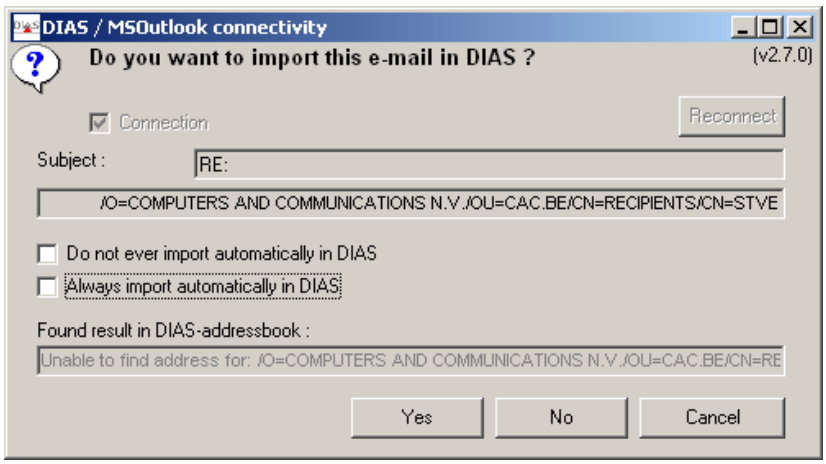
To use the e-mail function your Outlook account should be active. If not, you will get the following error:



- Click on to search the e-mail address of your addressee in the DIAS Address book.

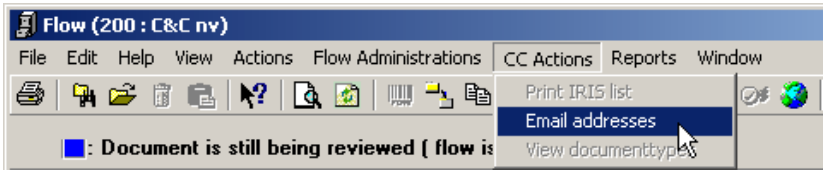


- Double click on the address line to insert the e-mail address in the "To"-field of your message.
- Click to mail your message.
- When you send or receive a mail message DIAS will always ask if you wish to import the e-mail in DIAS. The DIAS / MS Outlook connectivity window will appear:

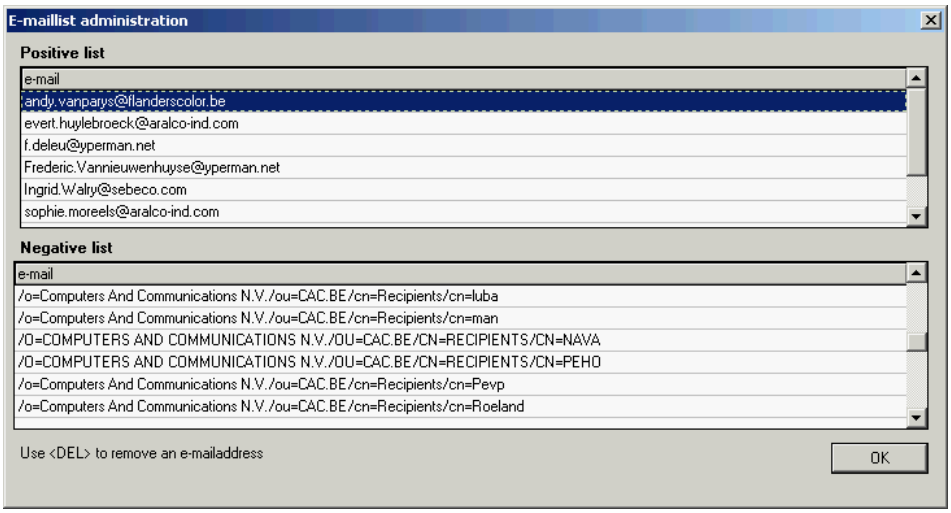


- If there is no connection between the Local server and MS Outlook (which is normally established automatically), you can click on to restore the connection between MS Outlook and DIAS yourself.
- **Do not ever import automatically in DIAS**: the e-mail address will be added to the negative list (= from now on DIAS will never ask if you wish to import the e-mails of this addressee in DIAS, the e-mails (send / received) will never be added to archive).
- **Always import automatically in DIAS:** the e-mail address will be added to the positive list (= from now on DIAS will never ask if you wish to import the e-mails of this addressee in DIAS, the e-mails (send / received) will be automatically added to the archive).

You can consult / modify the positive and negative e-mail lists. Select CC Actions in the menu bar and choose Email addresses or click on in the MS Outlook menubar.


Flow (200 : C&C nv)
File Edit Help View Actions Flow Administrations CC Actions Reports Window
Print IRIS list
Email addresses
View documenttypes
: Document is still being reviewed (flow is

If you wish to remove address from the list, select the address and press Delete.



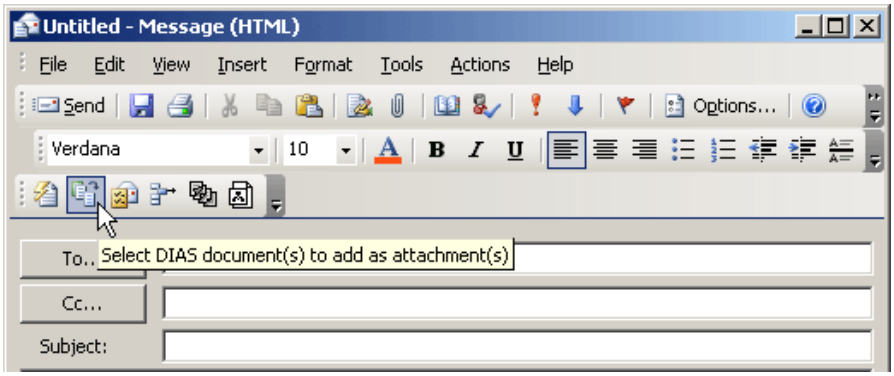
Attention!

Each user can only view and modify his / her own positive and negative list.

16.3. Add a DIAS document as attachment

Instead of first selecting your document and then writing your e-mail (as described on page 72: Sending a file with MS Outlook), you can also choose to first write your e-mail and add one or more archived documents as attachment afterwards.

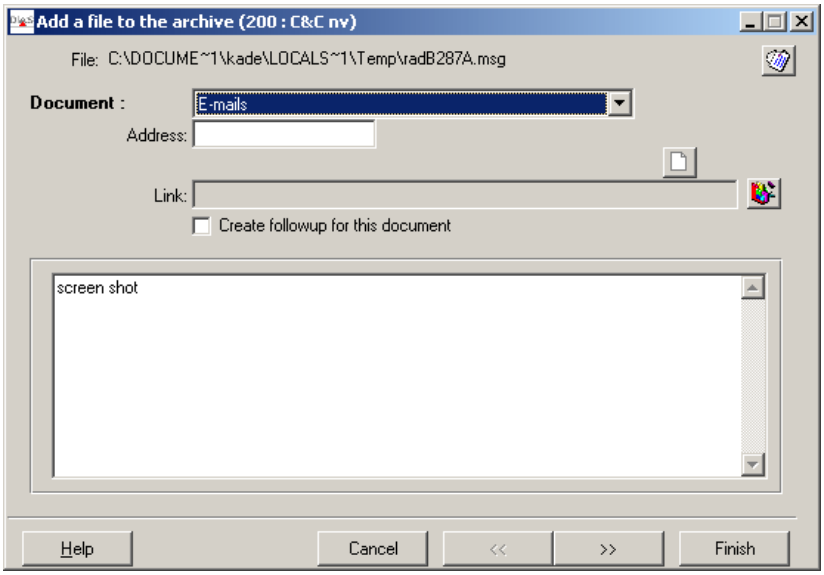
- Click on in your message window to open the DIAS archive.
- Select the file you wish to add in attachment (use the Ctrl-key if you wish to select several files).
- Double click on the document line and the file will be added to your e-mail.



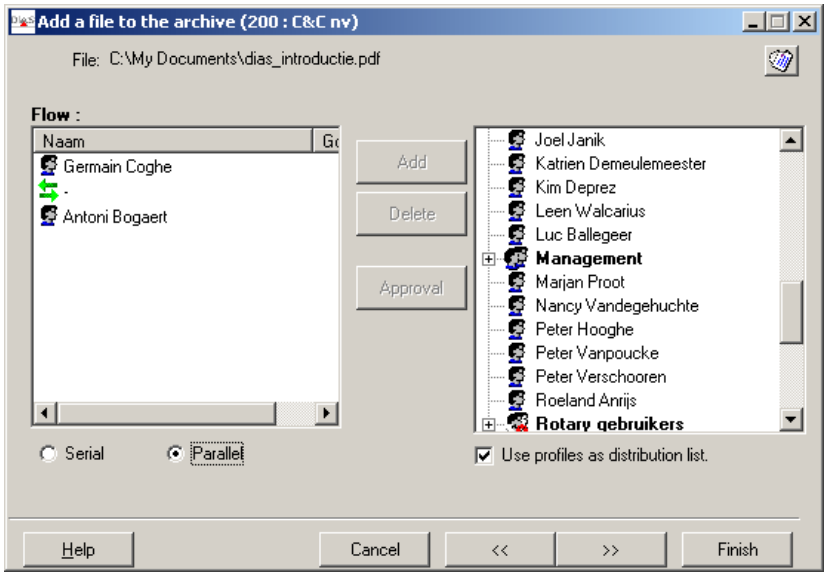
16.4. Import e-mails in DIAS

You can also manually import e-mails from your Inbox or Send items folder.

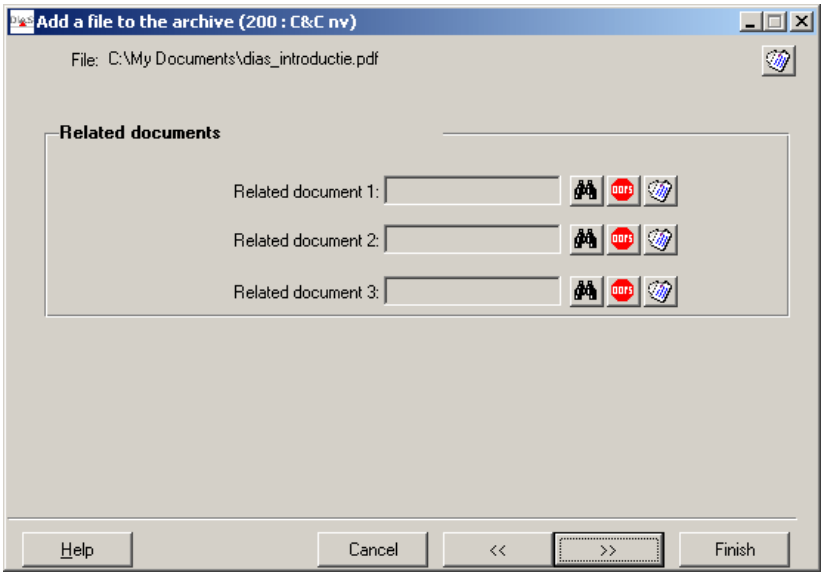
- Click in the DIAS toolbar on Submit to DIAS .
- The Add file to the archive window will open. DIAS automatically fills in the document type E-mails and the subject of your e-mail in copied in the description field. When the e-mail address of the dispatcher is registered in the DIAS address book, DIAS will also automatically fill in the Address field. Otherwise you have to type the address yourself.
- To view the original document click on
- To add a new sub address in the DIAS address book click on
- You can relate the e-mail to a specific project. To open the list of projects click on



- Click » to go to next window.
- If you wish you can immediately add a flow to the document.



- Click » to go to next window.
- If you wish you can relate other documents to this e-mail (for example: you receive an e-mail with a question related to an offer you previously faxed. You can link the fax to the received e-mail)

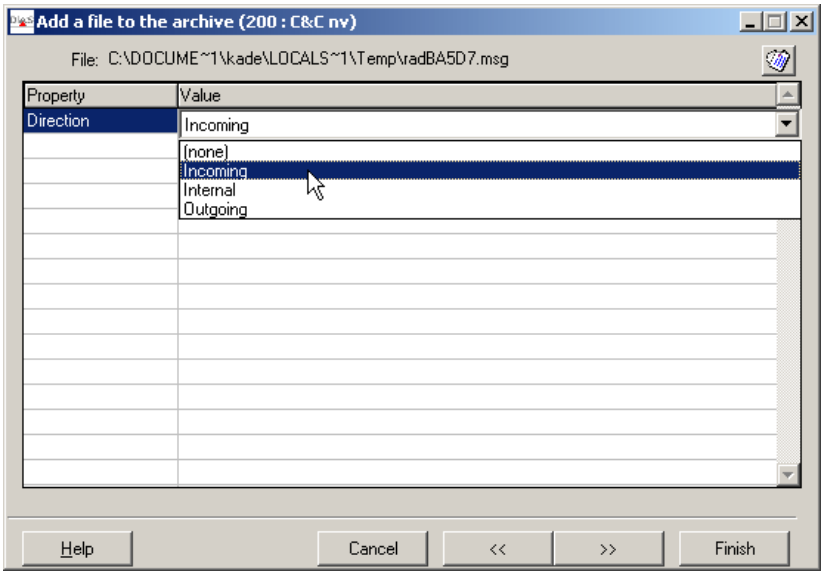


Search a document: click here to look up the related document.

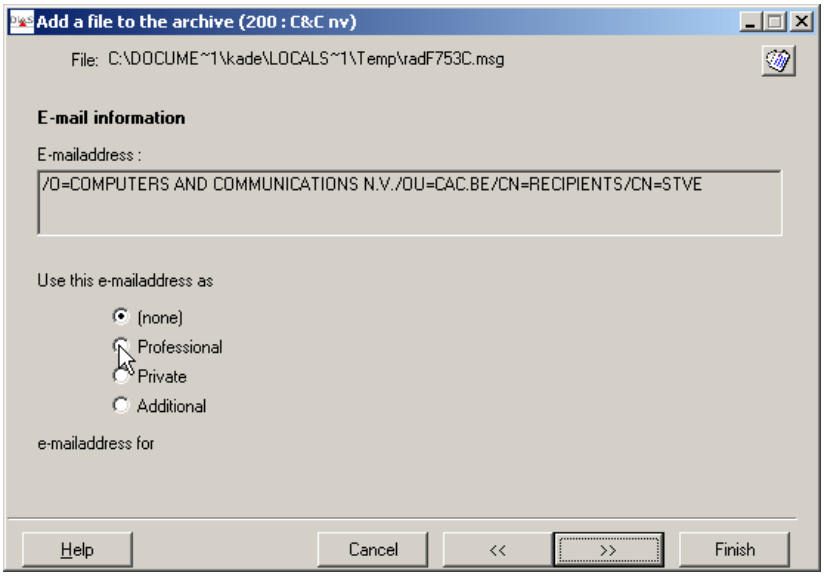
Remove the related document: remove the relation between the selected documents.

View this document: view the document in its original application.

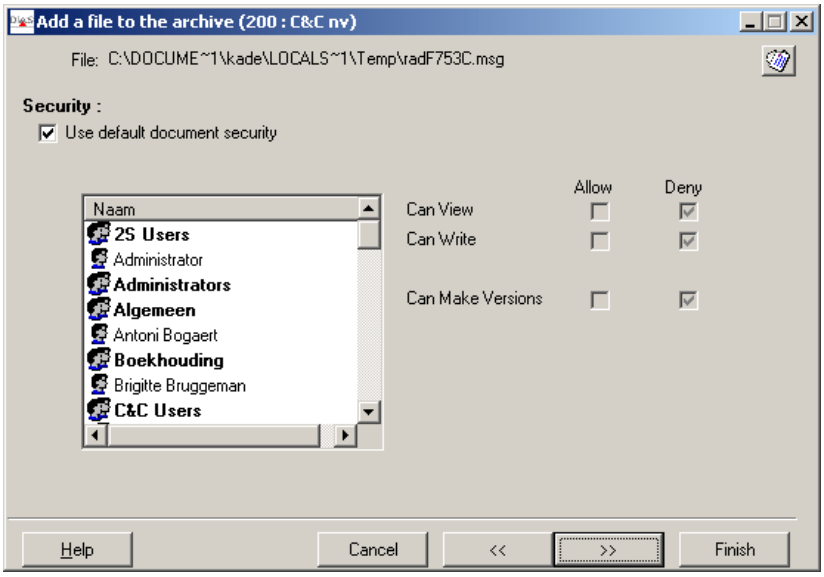
- Click » to go to next window.
- Here you can select the direction of your e-mail: incoming, internal or outgoing. You can also choose to add other properties to this document type.



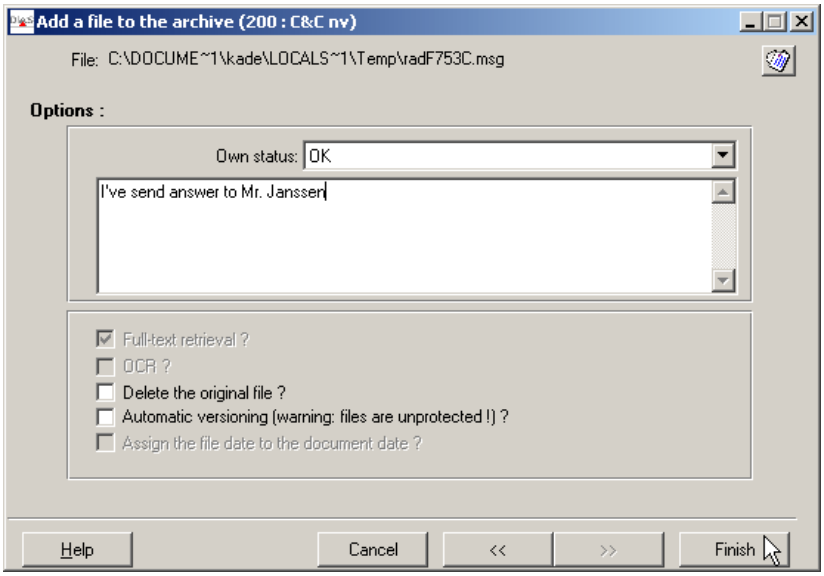
- Click » to go to next window.
- You can choose if the e-mail address should be registered as the professional, private or additional (optional) e-mail address in DIAS. The e-mail address will be added automatically to the address information of the contact person.



- Click » to go to next window.
- In this window you can change the document security settings that are applicable on the e-mail you are importing in DIAS. Standard DIAS will use the default document security.



- Click » to go to next window.
- In this window you can add a status to the document and write your comments or remarks. You can also choose to use Automatic Versioning; see page 59: Automatic Versioning. (Deleting the original file is not possible in MS Outlook)



- Click Finish to add the e-mail to the archive.

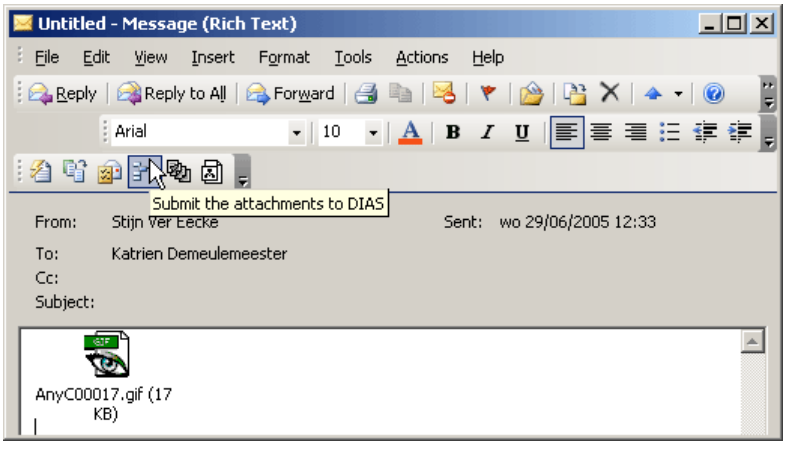
Attention!

You are not obliged to follow all the steps as described above. Already on the first window you can press Finish and complete the import of your document. This means that you do not wish to flow the document, related it to other documents, change the security settings, etc.

16.5. Import an e-mail attachment in DIAS

You can import the attachment of a received immediately in DIAS. The contents of the text message will not be included.

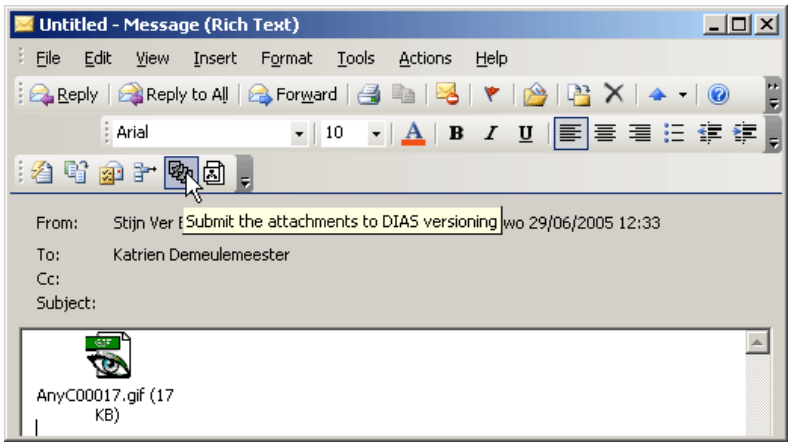
- Click to import the attachment of the selected mail in DIAS.
- The window Add file to the archive appears (see page 31: Import files in DIAS).



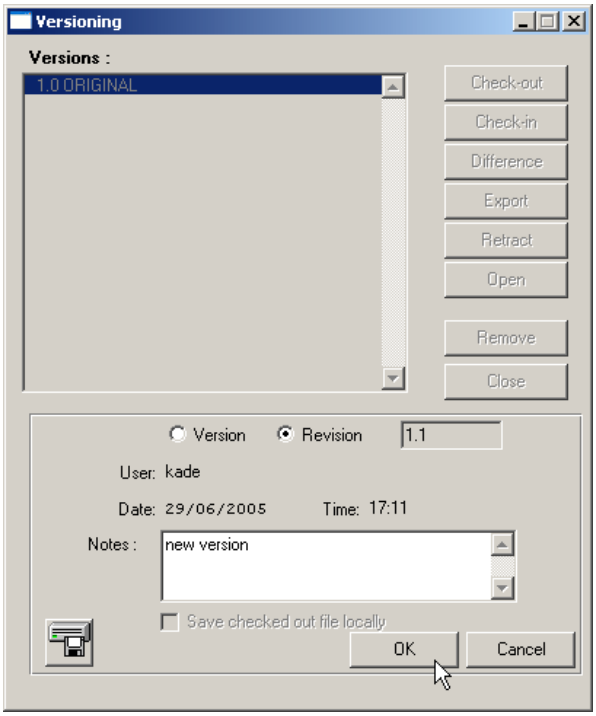
16.6. Import an e-mail attachment with DIAS versioning

When the attachment you have received is a new version of an existing archived document, you can choose to import the attachment with Versioning.

- Click to import the attachment as a new version.



- Look for the initial document in the DIAS archive.
- Double click on the document line to open the Versioning window.

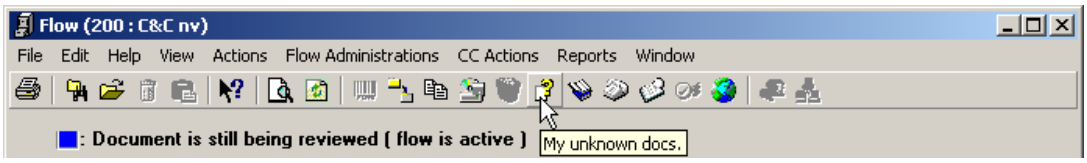


- Select if you want to import the attachment as a new version or a revision. Add your comments and click OK.

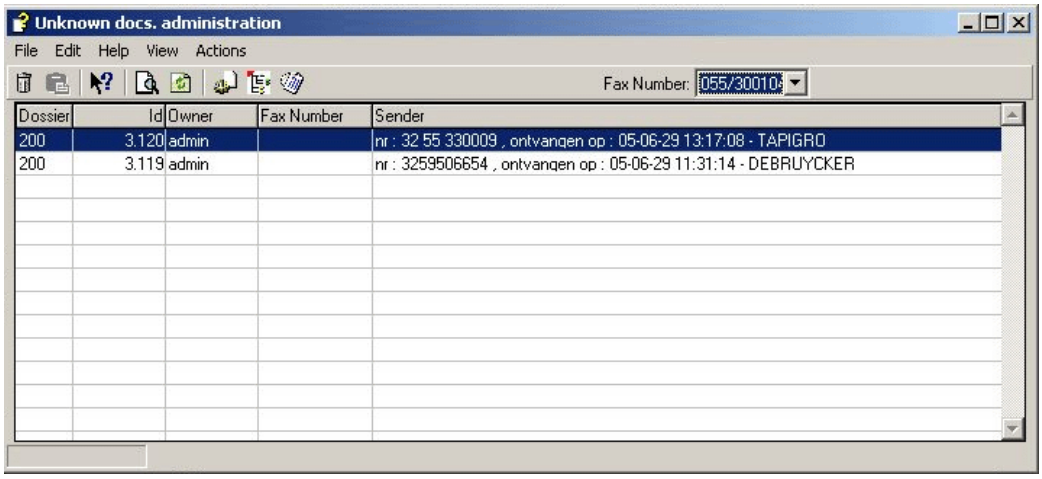
You find more information on Versioning and Automatic versioning on page 59.

17. Processing incoming faxes

To use this function the DIAS systems has to be connected with your digital fax software.
The incoming faxes will be registered as "Unknown docs".


Flow (200 : C&C nv)
File Edit Help View Actions Flow Administrations CC Actions Reports Window
: Document is still being reviewed (flow is active)
My unknown docs.

- Click on "My unknown docs" in the archive window
  The "Unknown docs. administration" window will appear:


Unknown docs. administration
File Edit Help View Actions
Fax Number:
Dossier Id Owner Fax Number Sender
200 3.120 admin nr : 32 55 330009 , ontvangen op : 05-06-29 13:17:08 - TAPIGRO
200 3.119 admin nr : 3259506654 , ontvangen op : 05-06-29 11:31:14 - DEBRUYCKER

- In this window you get an overview of all the incoming faxes.
- Click on Process document (or double click) to assign some data fields to the document.
  More information on adding documents to DIAS see "Import files in DIAS" on page 34.
- To see the content of the fax, click Show document . DIAS will open the fax in your fax software viewer.

197127.G3N - Imaging
File Edit View Page Zoom Tools Annotation Help
33,79%
29/06/2005 11:31 3259506654 OSWALD DEBRUYCKER NV PAG. 01/01
C&C Computers and Communications N.V.
INTERVENTIEFORMULIER HELPDESK SOFTWARE
Geachte heer/mevrouw,
Volgende items kunnen op uw aanvraag worden uitgevoerd, doch vallen niet onder het supportkontrakt voor IRIS.
Teneinde de programmatie in de planning te kunnen opnemen, verzoeken we U vriendelijk deze aanvraag ingevuld en ondertekend terug te sturen :
AANVRAGER :
Naam/firma : Oswald DE BRUYCKER
Naam contactpersoon : Yanick Tanghe
For Help, press F1
33,79%
Page 1 of 1

18. Address book and CRM

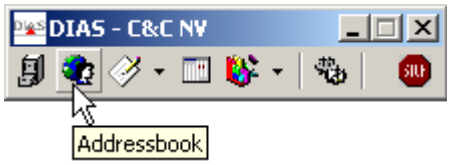
18.1. Introduction

DIAS also provides an address management module to manage all the company and contact information of your customers, suppliers, employees, partners, etc. All the information is managed in 1 central database. Today most of the people have their own address book on their personal computer. With 1 central database you minimize the risk of using incorrect address information or losing important contact data.

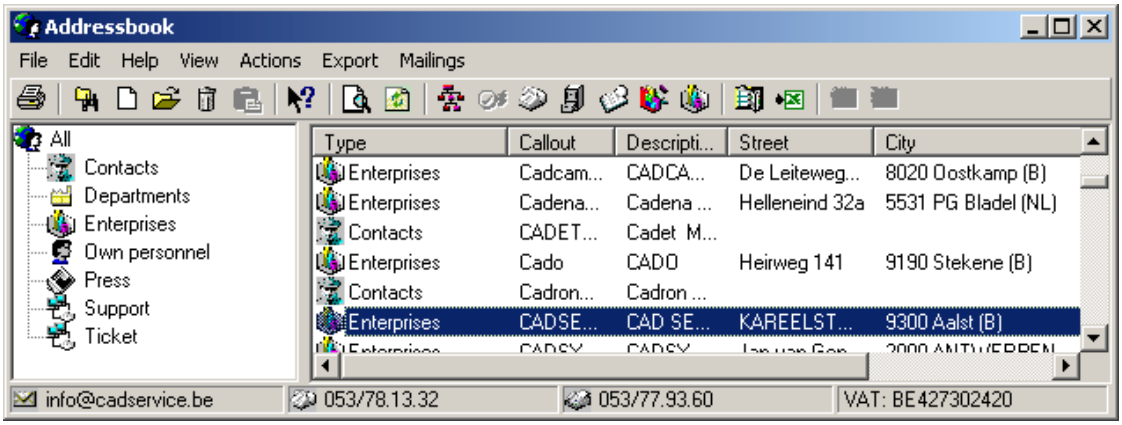
The addresses can be imported from existing applications (ex. bookkeeping, Outlook contacts, etc.) Addresses that occur twice can be merged together. With the CRM (= Customer Relationship Management) module you can even link addresses to one another.

Address book

To start the address management click on Addressbook in the DIAS start menu .



The addressbook window will appear:



In the left part of the window you see the different address types (contacts, departments, enterprises, etc.). In the right window you see the requested addresses.

To open the address details you can:

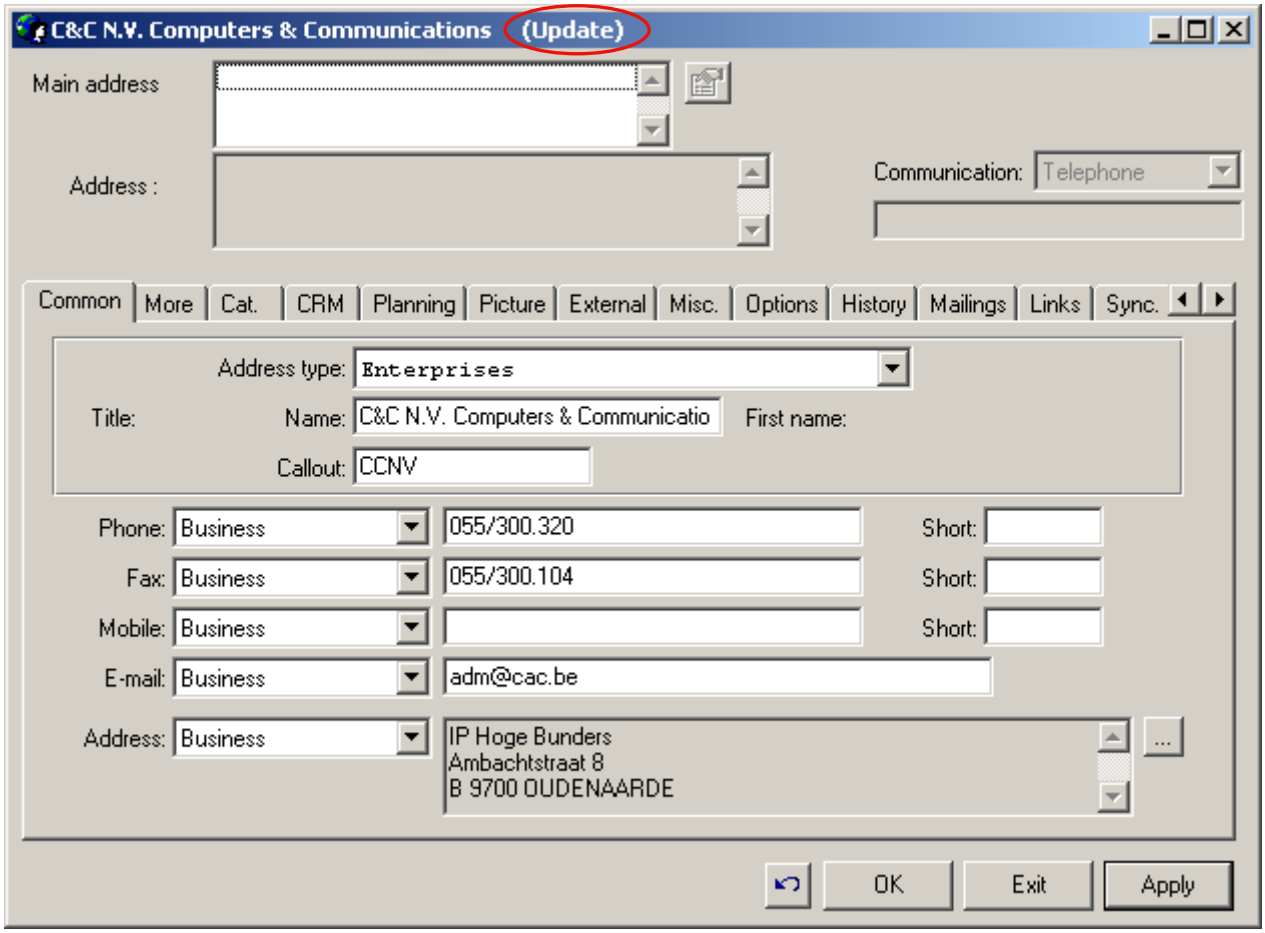
- Double click on the address line. The detail window will appear and you can modify the information.

OR

- Click right on the selected address and choose:
  Show: to open the address details, you can not modify the information.
  Open: to open the address details, you can modify the information.

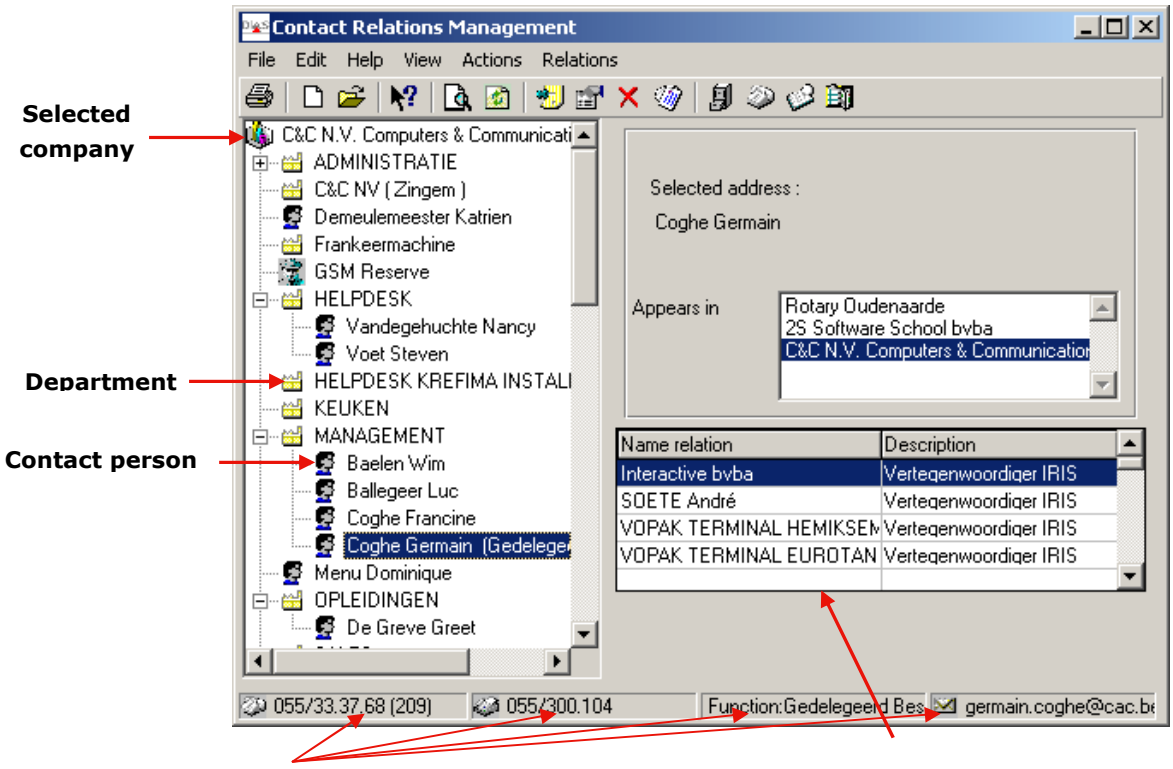
Address detail window:

→ "View" indicates that you can not modify the address information.



→ "Updates" indicates that you can modify the address information.

To see the organisation structure of the selected company click on CRM .
The CRM window will appear:



Enterprise | Department | Contact person | Personnel

Buttons in the **CRM toolbar**:

Print: print an overview of the company structure.

New: create a new company, department or contact person.

Modify: open the address details of the selected company, department or contact person with possibility to modify the information.

Help: click here to activate the help menu.

Detail: open the address details of the selected company, department or contact person. You can not modify the information.

Refresh: refresh you window with the most recent database information.

New relation: create a relation between several companies or contact persons. (More information on page 90: vertical and horizontal relations)

Relation info: select a relation (right below in the CRM window) and click relation info to get more information concerning the relation.

Delete relation: select the relation you wish to remove and click delete relation.

Show document: you can add a document to a relation (often this document will provide you more information on the relation in question). To view this document click show document.

Archive: show all the archived documents assigned to the selected company or contact person.

Follow-up: create a telephone call, visit report, internal note, etc related to the selected company or contact person. Address and sub address will be completed automatically.

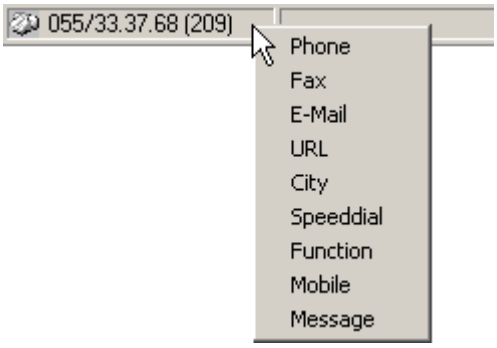
Planning: add an item to your planning related to the selected company or contact person. Address and sub address will be completed automatically.

Clipboard: the information of the company or contact person (name, address, phone and fax) are saved on the clipboard and can be copied easily in other applications.

On the right site of this window you see "Selected address appears in"

Certain contacts can be related to a number of companies or organisations. In this example the contact person is related to 3 organisations. By clicking on the name you can see the structure of the organisation in question.

Below in the CRM window you find panels that give you additional information on the selected company or person: phone, fax, e-mail, mobile, function, etc. You can choose which information you wish to see in which panel. Click right in the panel and select the information you wish to see.



Usually there will be one person marked in bold. This is the main contact person (in most cases the business manager).

To see the address detail window, double click on the address line or click right and select Open.

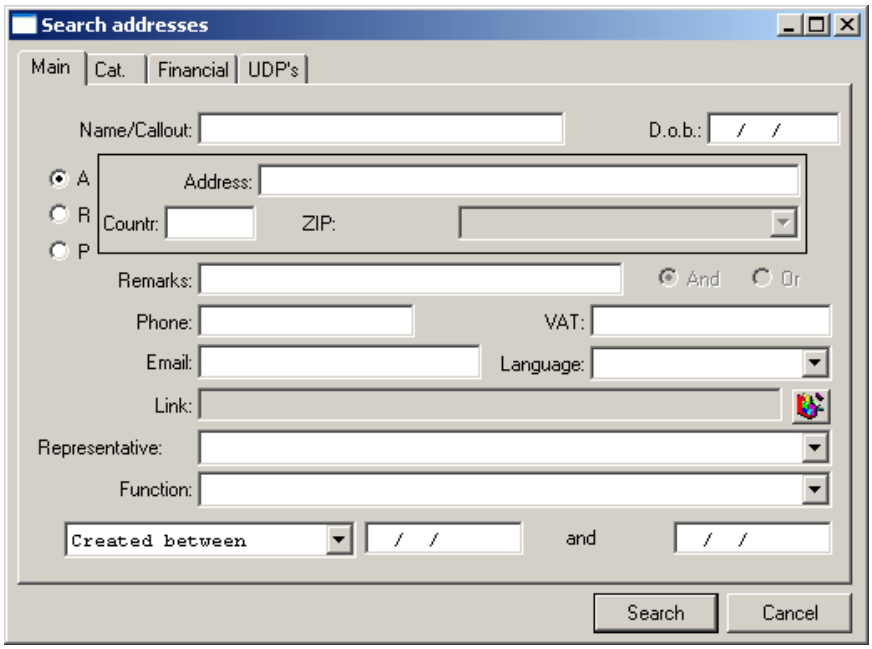
18.2. Search a company or contact person

To look for a company or contact person in the DIAS address book:

- Select in the left window in which category you wish to search (the contents of this list can differ).

It most cases it is not very interesting to select All. This can increase the time of your search considerably as DIAS has to go through the entire database.

- Click Search (or press F3) to open the Search addresses window:



- You can use a wide range of search criteria to find the company or contact person you need.

  For example: type the first letters of the company name in the Name/Callout field. Click Search. You will get a list of all the records that start with these letters.

Attention!

All the search criteria use AND-relations. This means that it is not possible to search all the addresses that start with jan OR that are located in Brussels.

Description of all the fields on the Search addresses window:

- Name/Callout: use this field to search on the name or callout. The callout is usually the surname + first name, without spaces. Example: the callout of 2S b.v.b.a. is 2sbvba.
- Address:

→ Address
→ Region
→ Postal code

↳To see the list of country codes, click right in the country field.

↳You can only fill in the zip code after completing the country code.

- **Remarks**: you can use this field to search for content of the message field (see tab More of the address details).
- **Phone**: search by means of the phone number.
- **VAT**: search by means of the VAT number (without spaces, points, etc. but with the country prefix, ex. BE).
- **E-mail**: search by means of the e-mail address.
- **Language**: select the language of the company you're looking for.
- **Links**: you can search a company related to a specific project.
- **Representative**: if you work with representatives (ex. sales), you can select here the representative to see all the companies related to this person.
- **Function**: select one of the functions if you wish to look for (a) contact person(s) with a specific function.
- **Created between**: look for all the addresses created in a specified period.

On the tab **Cat.**: on this tab you can select one of the defined categories, for example: prospect, customer, competitor, delivery address, etc. With this search field you can get a complete list of all your prospects in a few seconds time.

On the tab **Financial**: on this tab you can make a selection of company's based on their turnover.

On the tab **UDP's**: you have the possibility to define a number of specific field (free to choose); for example: industry, number of employees, travel distance, etc.

Jokers

When you only know a part of the name (or another search criteria), you can use jokers or wildcards. Example: you know that the company you're looking for has "info" OR "information" in the message field. Fill in info* in the remarks-field.

For all the character fields you can also search on the beginning of a string (Ex. when you look for the company Financials, it is sufficient to fill in "Fin" in the Callout field. All the company names that start with "Fin" will automatically appear).

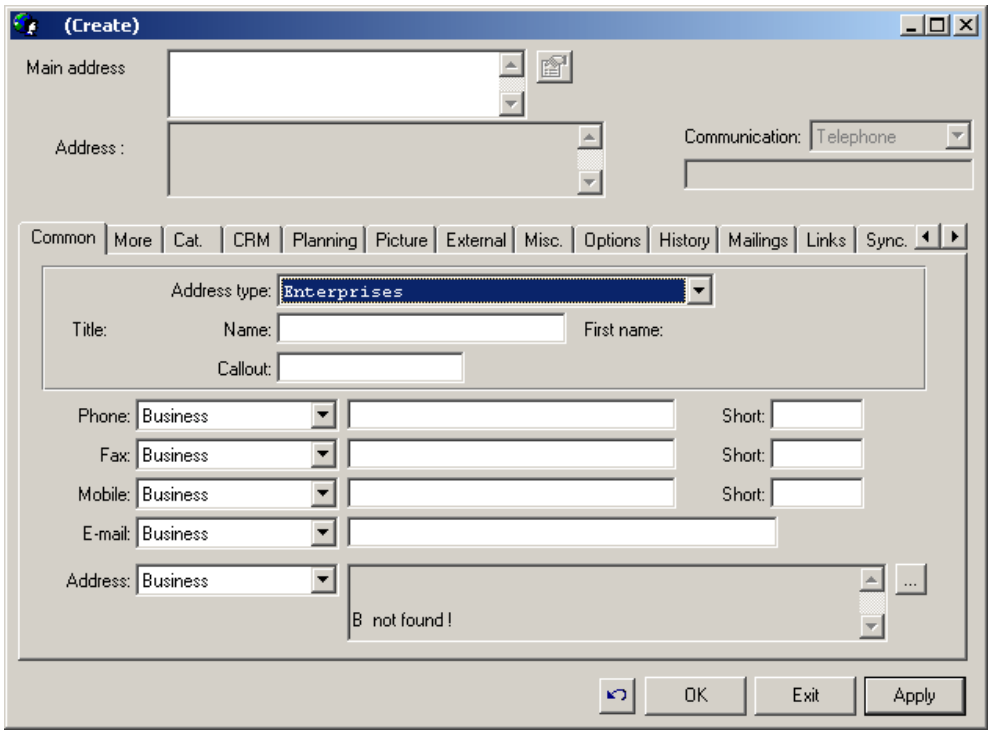
When you only know a part of the word, you can use an asterisk * before and after the word. Example: when searching for *Don* you will also get *McDonald*.

Attention!

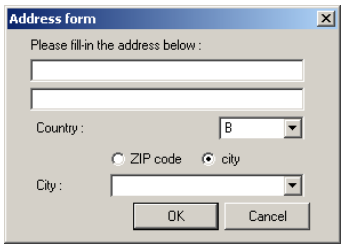
This last rule is not valid for the field remarks. Example: when you are looking for all the addresses that have "*warning: competitor!*" in the field remarks, you can enter "*warning*" or you can also type "*warn**" in the search field. But using **rning**, will give no result.

18.3. Add a company to the address book

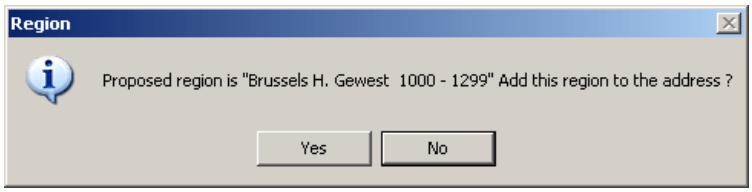
- Open the address book and select New…
- The window create will appear. In the different tabs you can add information regarding the company. (Use the tab-key to shift easily to the next field)



- Click on the Build address button ... to add address information. The address form will appear:



- When you click OK, the system automatically asks if you wish to add the proposed region to the address:



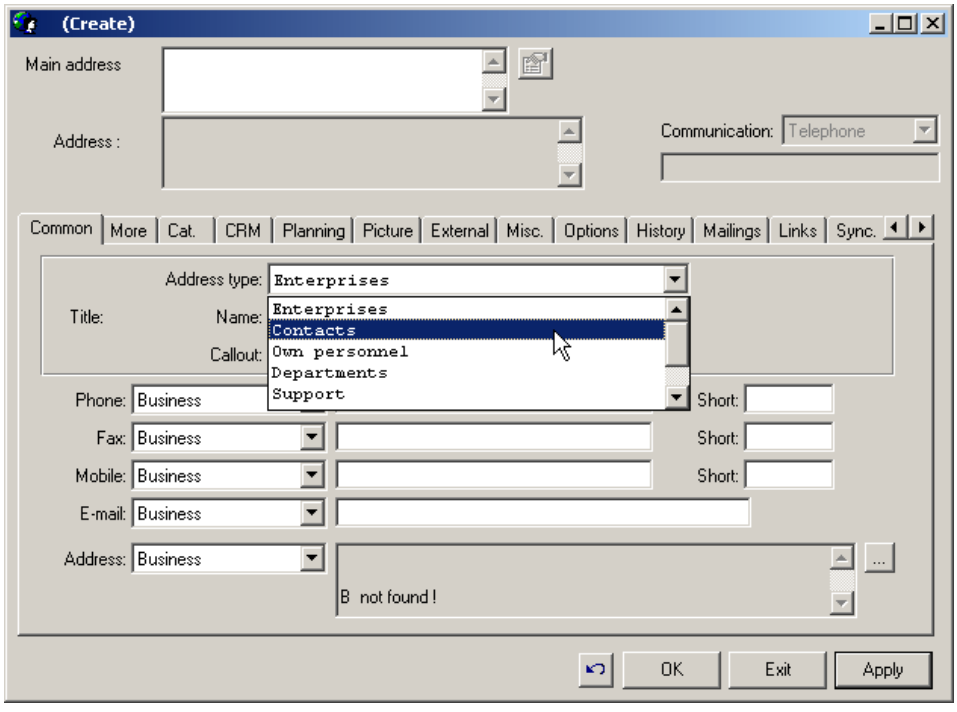
- Finally click Apply to save the information you have entered or the changes you have made.

18.4. Add a contact person to the address book

When you have added a company, you can also register the persons who work for this organisation. In DIAS they are called "contact persons". The number of contact persons that can be added per company is almost unlimited. Contact persons that occur twice can be merged.

To add a new contact person:

- Open the address book and search the company or department to which you wish to add a contact person.
- Select the address line and click on CRM
- Select the company or the department where you wish to add a contact person and click New
- The window Create will appear. In the field "address type" you select Contact
  In the other tabs you can enter information regarding your contact person.



Attention!

When **creating a new contact person** make sure that you select the above lying department first. For example: if you wish to add a new contact person to the administrative department, first select this department and the choose *New* . Or if you wish to create a new department, first select the company name and then choose *New*.

Changes in the structure can also be made afterwards. Select the department to which you wish to add an existing contact person. Click right and choose Add. Now fill in or select the name of the person you wish to add. Remark: the contact person appears now twice in the company structure. If you wish to remove one of them, click right and select Remove.

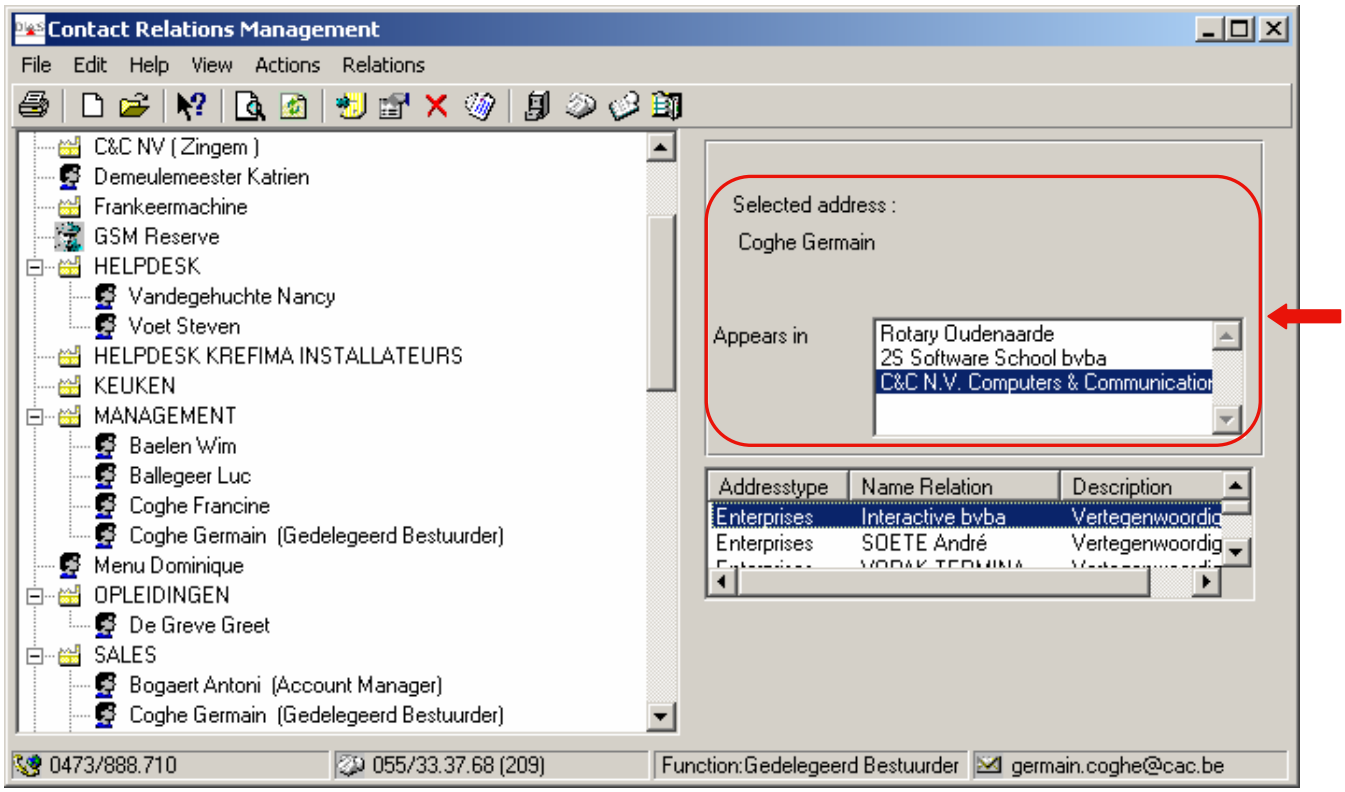
18.5. Vertical and horizontal relations

In the CRM module you have 2 types of relations:

- Horizontal relations: describing an organisation
- Vertical relations: describing the relation between one or several organisations

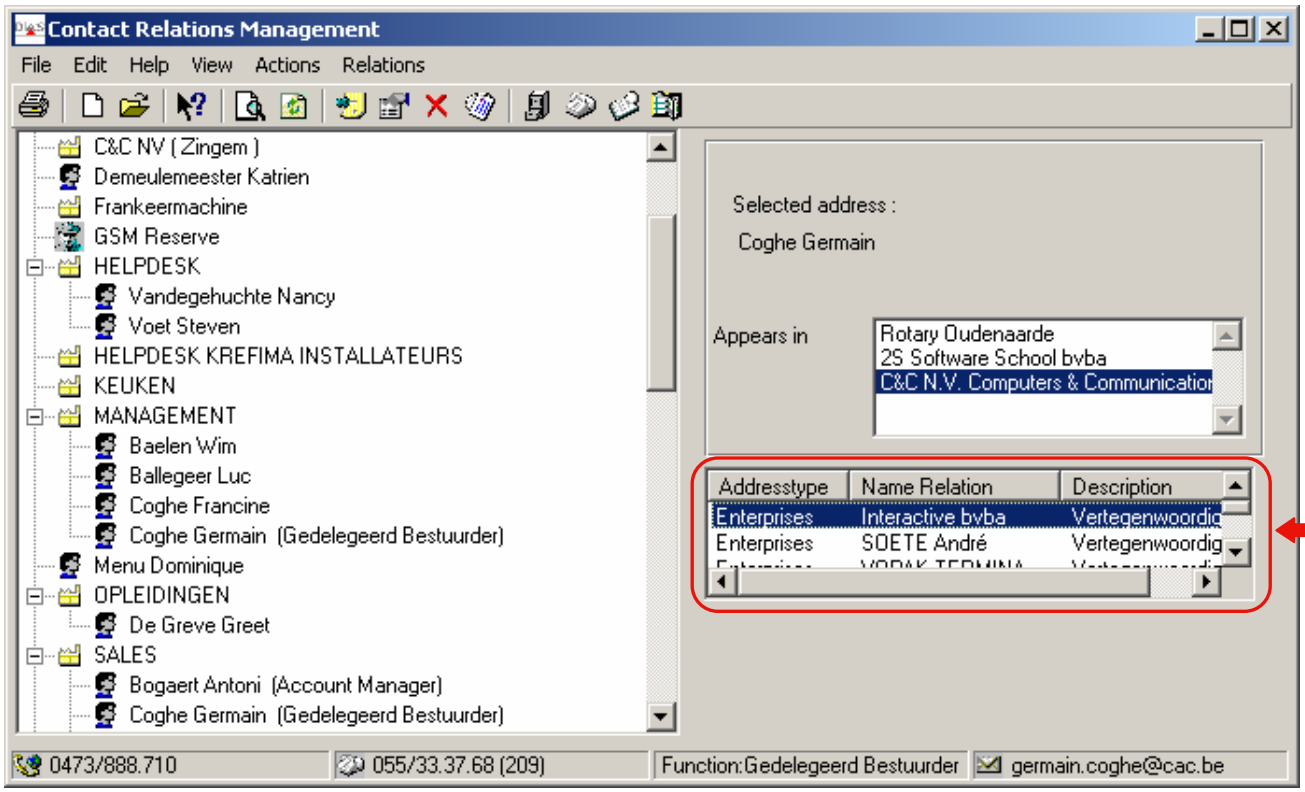
Vertical relations

Vertical relations are hierarchical relations with underlying addresses. You can assign which contacts belong to which companies. One contact can thus be related to several companies (in a different hierarchy). In the example underneath you can see that Coghe Germain appears in 3 companies. When you select one of the other companies, the CRM structure will change.



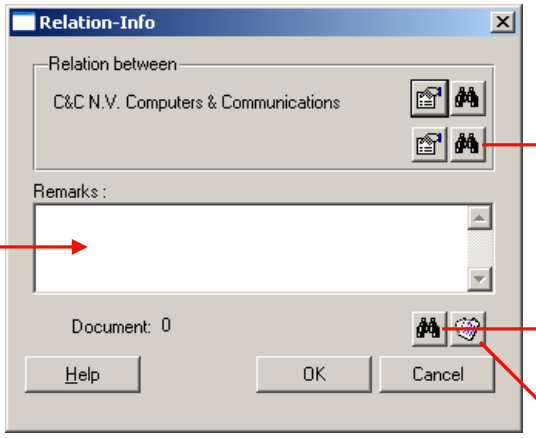
Horizontal relations

Horizontal relations are used to create relations between several addresses, without actually attributing it to the company in question. For example: when you have a large sales team, you can create horizontal relations between your customers and a particular sales person who is responsible for that customer.



To create a new relation:

- Select the contact in question in the CRM window.
- Click on new relation
- The window relation info will appear:
- Add a new relation by clicking . The address book will open and you can search the company or contact person for which you wish to create a relation.



Add comments or remarks

Create a relation with another company or contact person

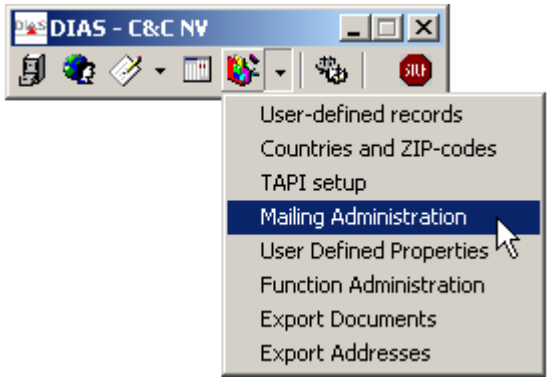
Add a document that is related to the relation you have created.

View the related document

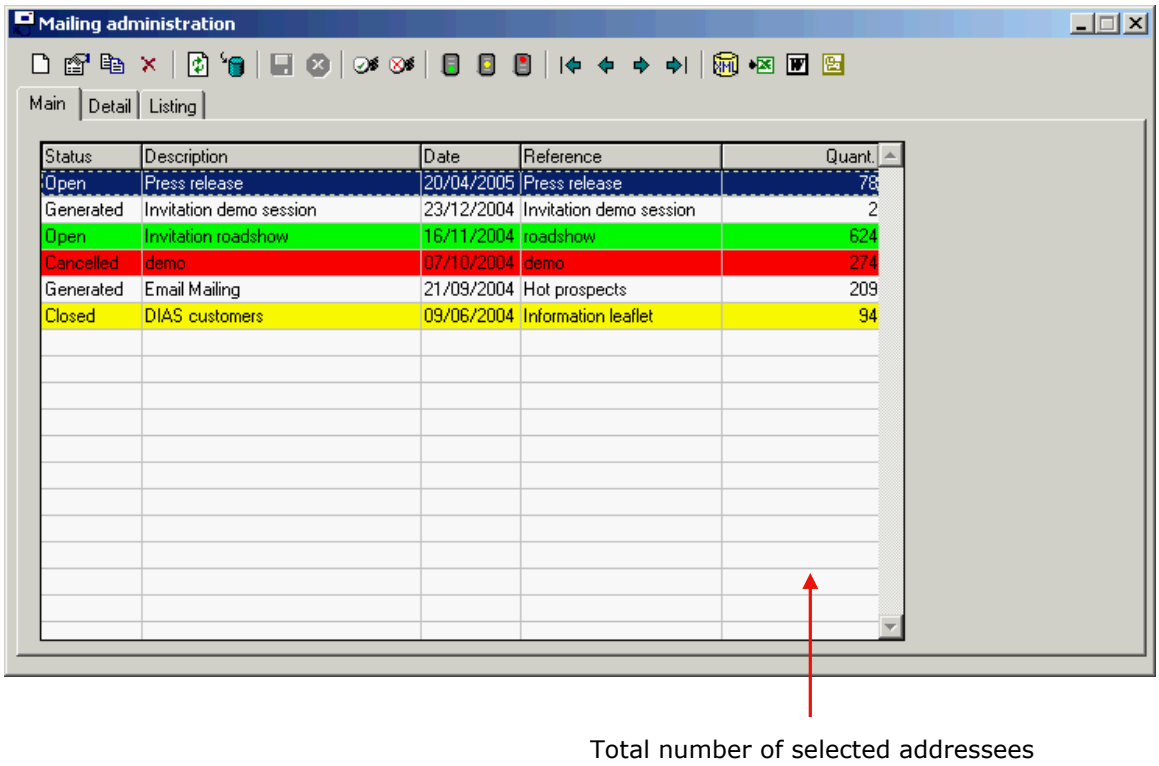
19. Mailing administration

With the mailing administration you can easily create mailings (regular mail / e-mail) based on the address information that is saved in the DIAS address book.

- To start the mailing administration, select Mailing Administration in the DIAS Start menu.



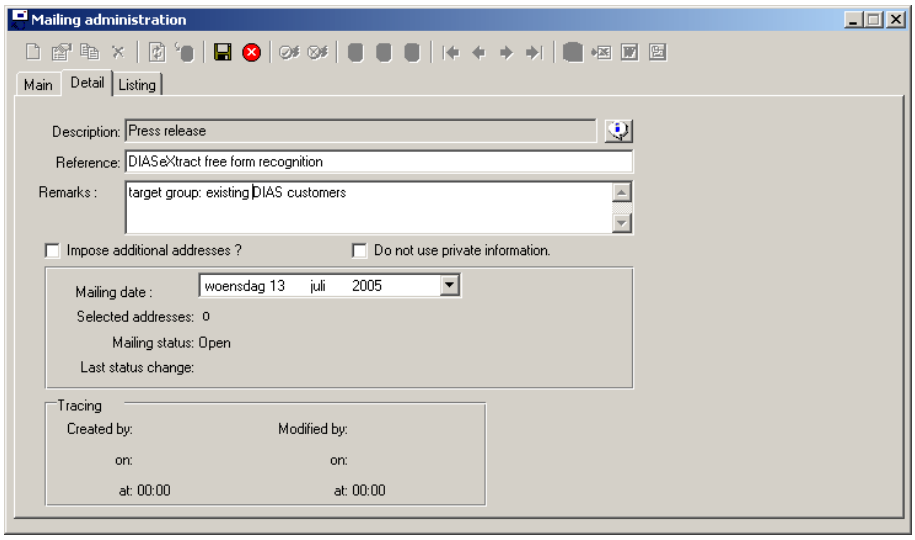
- The following window will appear:



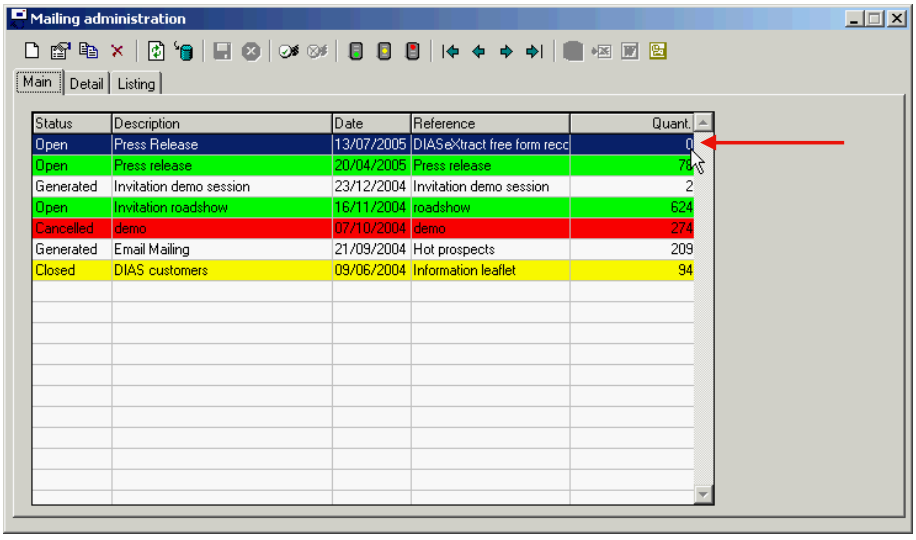
Total number of selected addressees

19.1. Create a new mailing

Click to create a new mailing. The tab Detail will open:



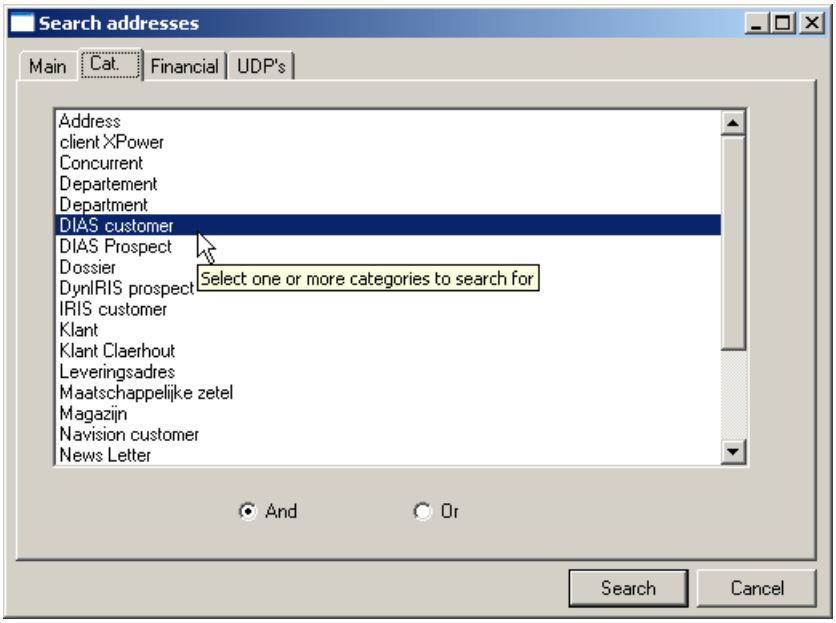
- In this window you can fill in a description, a reference and remarks.
- Click to save your mailing (or to quit without saving your mailing).
- In the tab Main you can see the new mailing you have created:



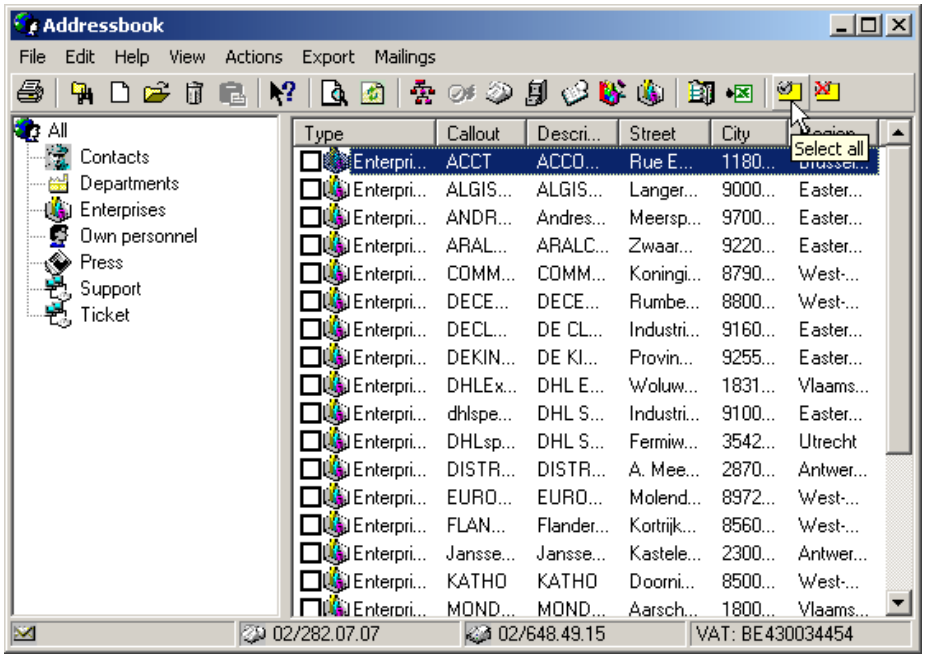
	To modify the details of a mailing (Remark: the mailing should be open)
	To delete the selected mailing (Remark: the mailing should be open)
	Click here to re-open a mailing
	Click here to close a mailing
	Click here to cancel a mailing
	Go to the previous or next mailing
	Go to the first or last mailing

19.2. Add contacts to a mailing

- Click add addresses to mailing to select the addressees in the DIAS address book.
- The address book will open. Click or press F3 to open the search window. You can use a wide range of search criteria to find the addresses of your choice. In our example we wish to select the DIAS customers:



- Click Search to see the addresses:

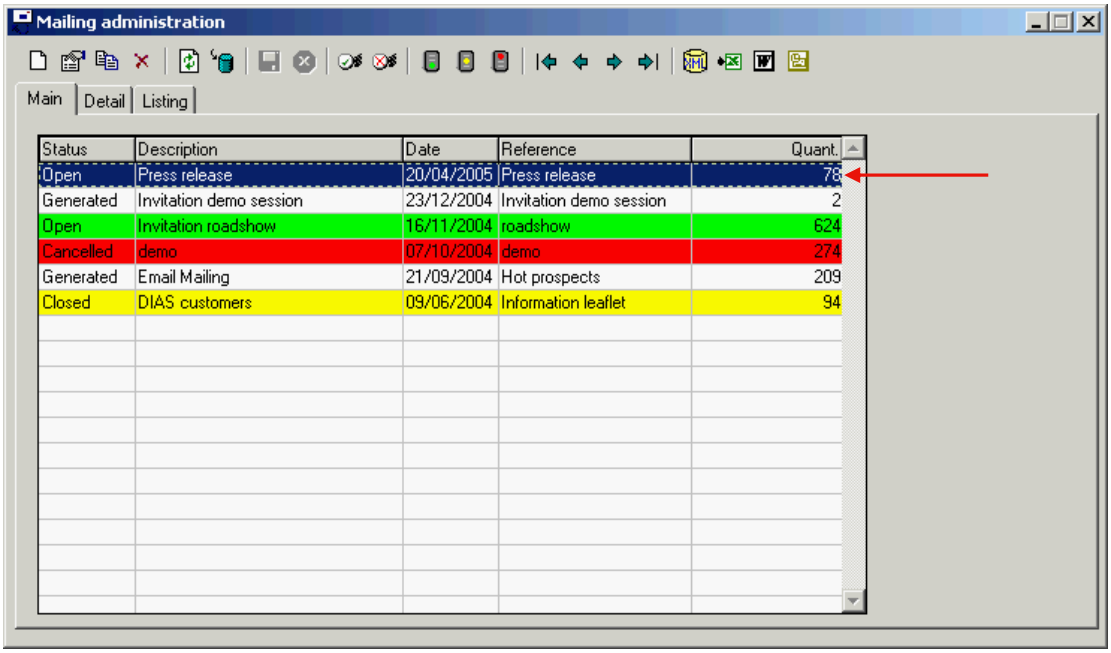


- You can select the addresses individually, but you also click on Select all.

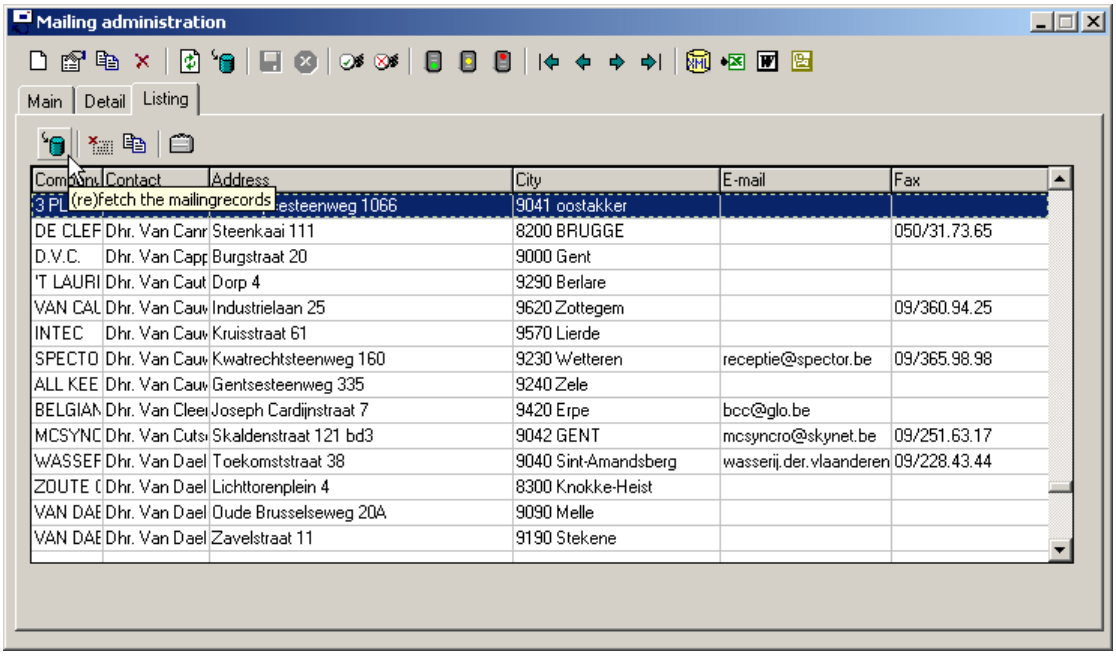
  Select all

Unselect all

- Close the address book and automatically all the checked addresses will be added to your mailing list. In the right column (Quantity) you see the total number of selected addresses.

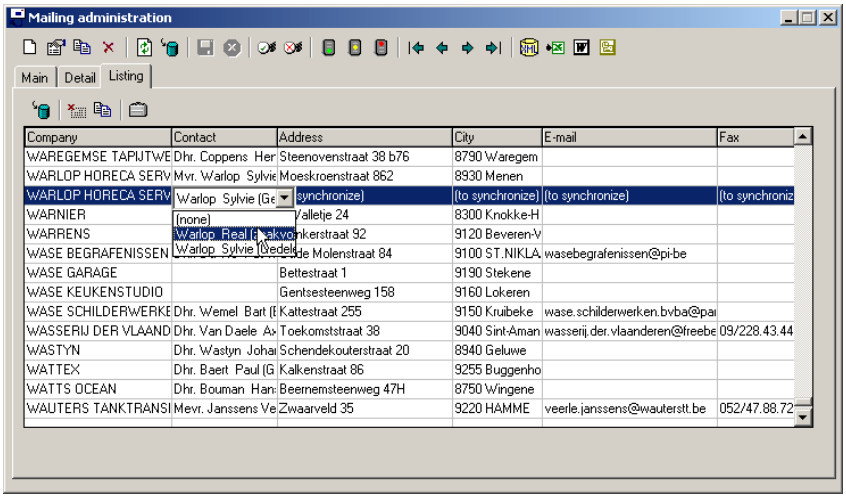


- On the tab Listing you can make - as a control - a list of all the selected addresses before exporting them to another application.
- Click to fetch the mailing records.

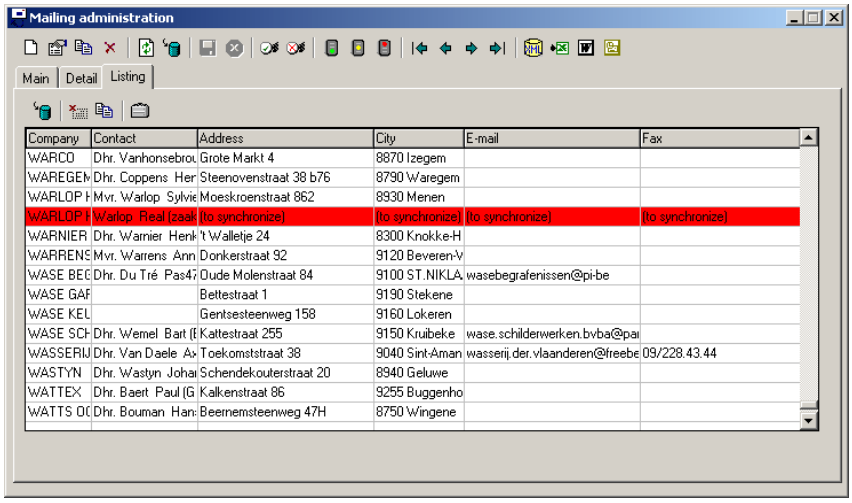


- Click on the column title to order the column in question alphabetically.
- If you wish to remove an address from the mailing list, click on

- If you wish to send the mailing to several contacts of the same company, you can copy the record.
  - select the record you wish to copy
  - Click on copy this registration .
  - A new record with the same address information will be created.
  - Select in the new record the new contact person.



- The new record will be shown in red until you synchronise the database. Click therefore on Resynchronize with database .

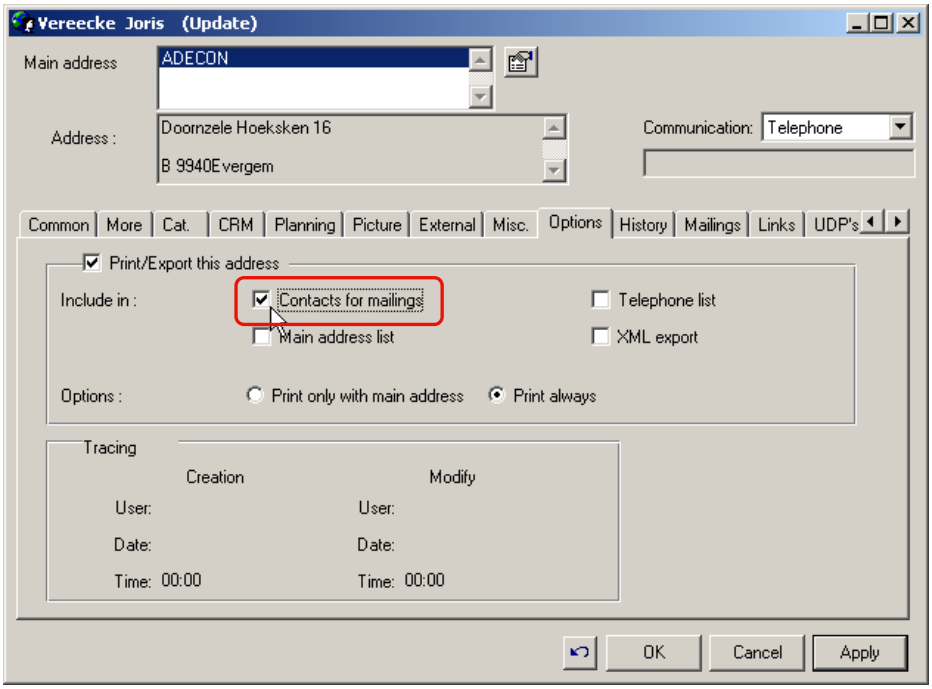


Attention!

This action will only last for this particular mailing.

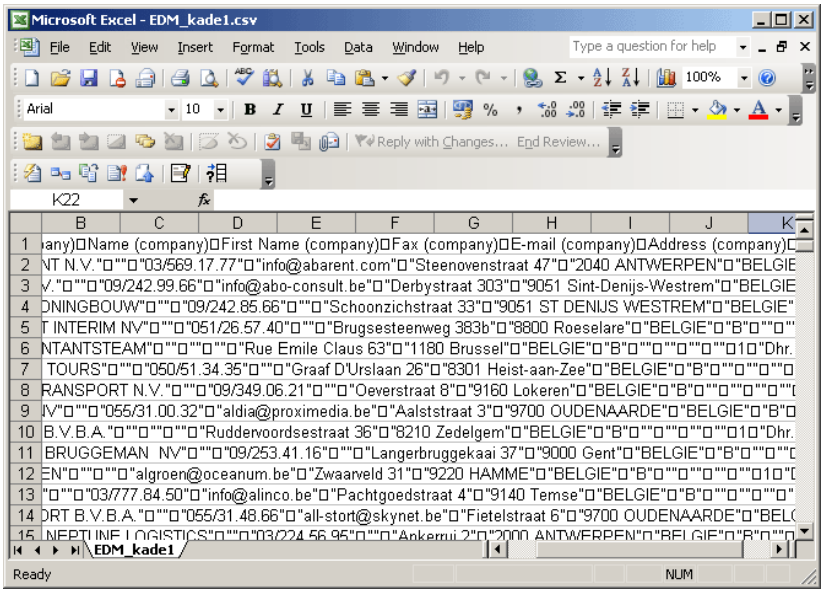
If you wish to use the same contacts for each mailing, you should:

- Open the address details of the contact person
- Open the tab Options and check the option Contacts for mailings

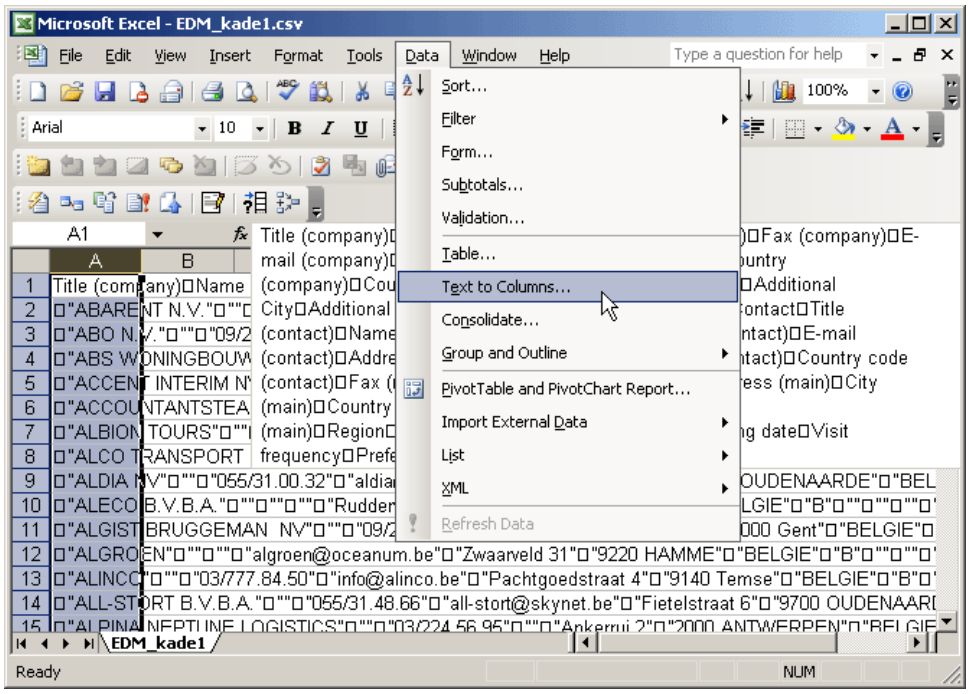


19.3. Export to MS Excel

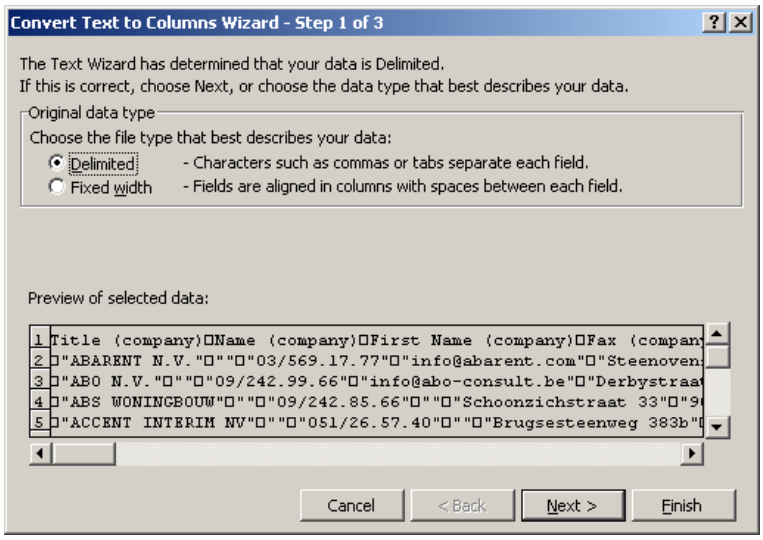
- In order to export the mailing you should first close the mailing: click on close the mailing
- Click on Export to MS Excel



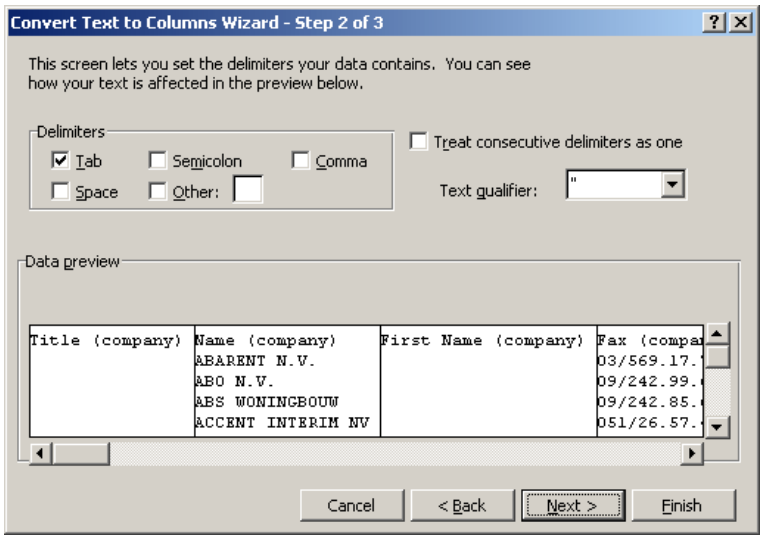
- Select the first column and open Data in the MS Excel menu bar. Select Text to Columns…



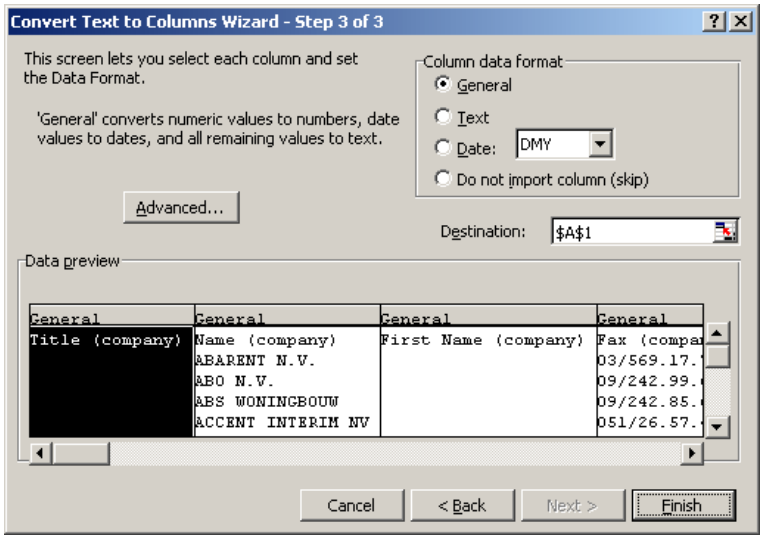
- The wizard Convert Text to Columns appears:


Convert Text to Columns Wizard - Step 1 of 3
The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.
Original data type
Choose the file type that best describes your data:
Delimited - Characters such as commas or tabs separate each field.
Fixed width - Fields are aligned in columns with spaces between each field.
Preview of selected data:
Cancel
< Back
Next >
Finish

- In the first window you see the selected text. Click Next.



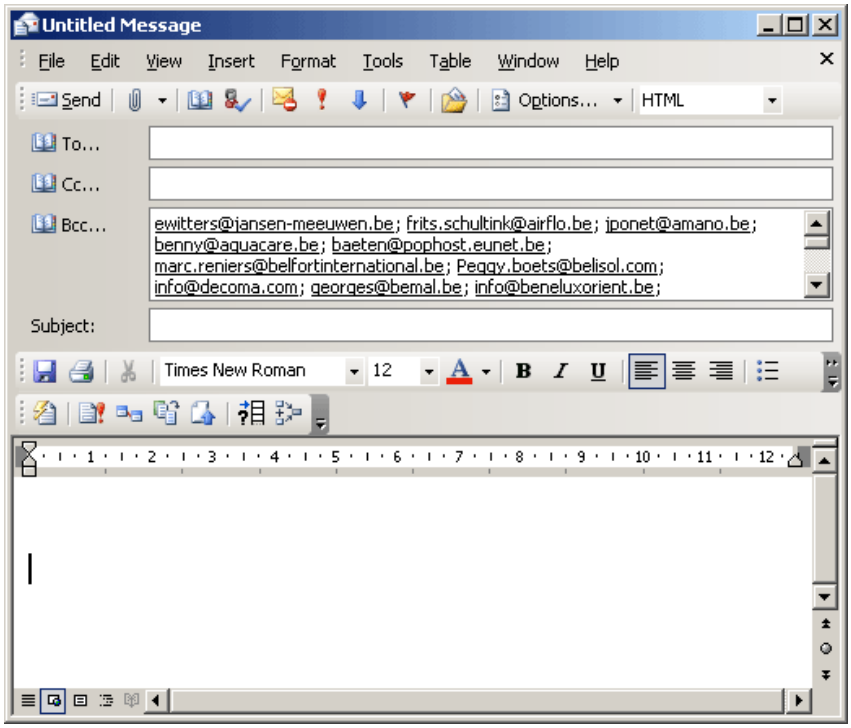
- In the second window you have to select the correct delimiter. For Excel this is Tab (generally this option is standard checked). Click Next.



- In the third and last step you have to define the data format of the different columns. The standard data format is General. Click Finish to import the list in MS Excel.

19.4. Export to MS Outlook

- Click on Make a global e-mail with MS Outlook
- An e-mail message will be generated and all the mailing addresses will be placed automatically in the Bcc field.



19.5. Export to MS Word

- Click on Start a mail merge in MS Word . Remark: you should create your letter first and save it on your local disk.
- You have to select a mail merge base-document.
- The mail merge document will be opened in MS Word.
- You can now insert the necessary merge fields.

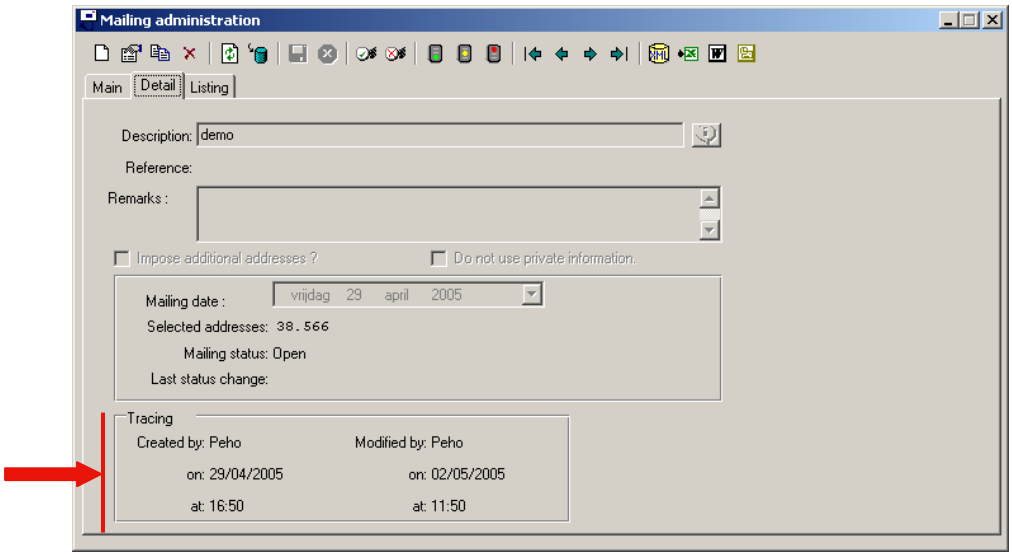
- Follow the usual steps of a standard MS Word mail merge to complete your mailing.

19.6. Export to XML

- Click on Export to XML
- You will get an XML sheet will the contact information of all the addressees. XML sheets are frequently used to export data to other applications.

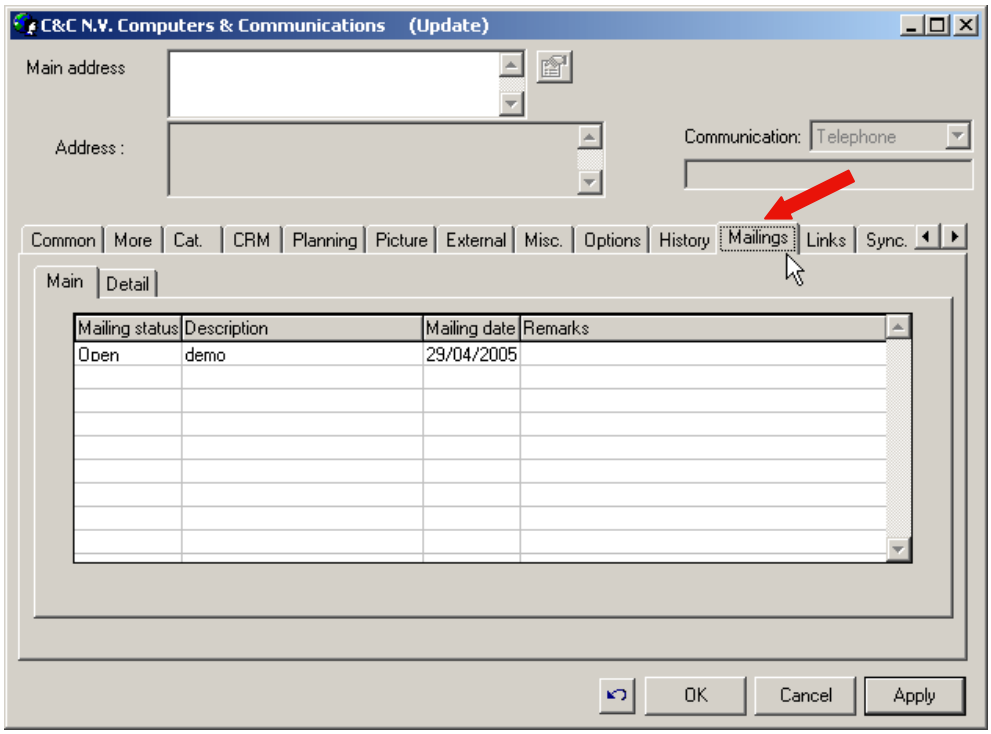
19.7. Remarks

- Mailings can only be modified by the person who has created the mailing.



- When the addresses have been exported (to Excel, Word, Outlook or XML) the status of the mailing will change to *generated*.

- Mailings are not registered in the DIAS archive but in the address detail window (tab: Mailings) you can see all the mailings that have been sent to the company or contact person in question.

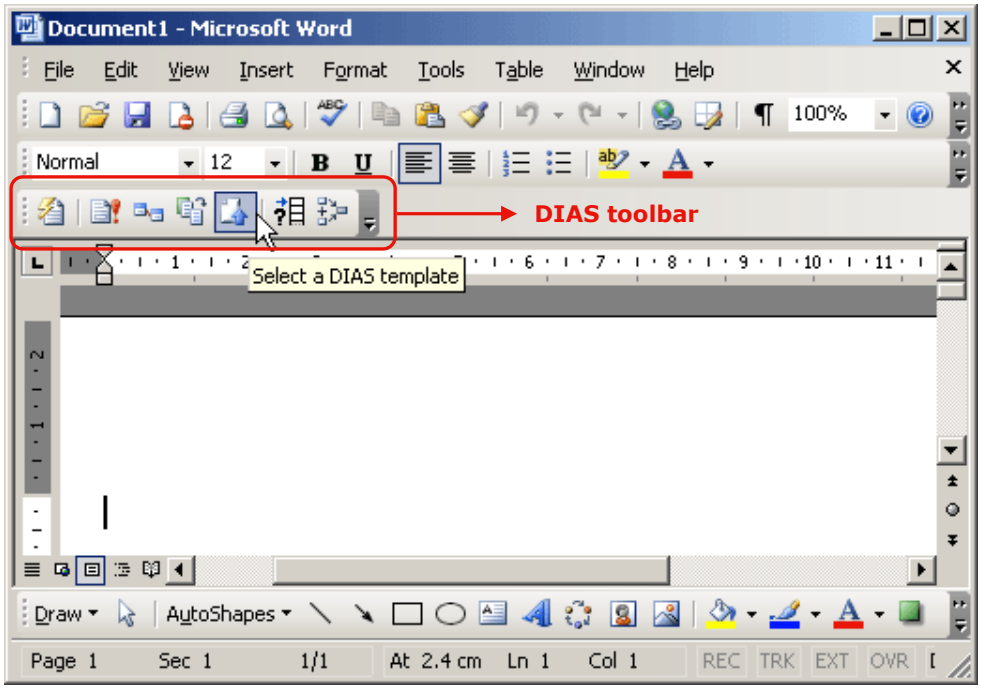


20. Templates

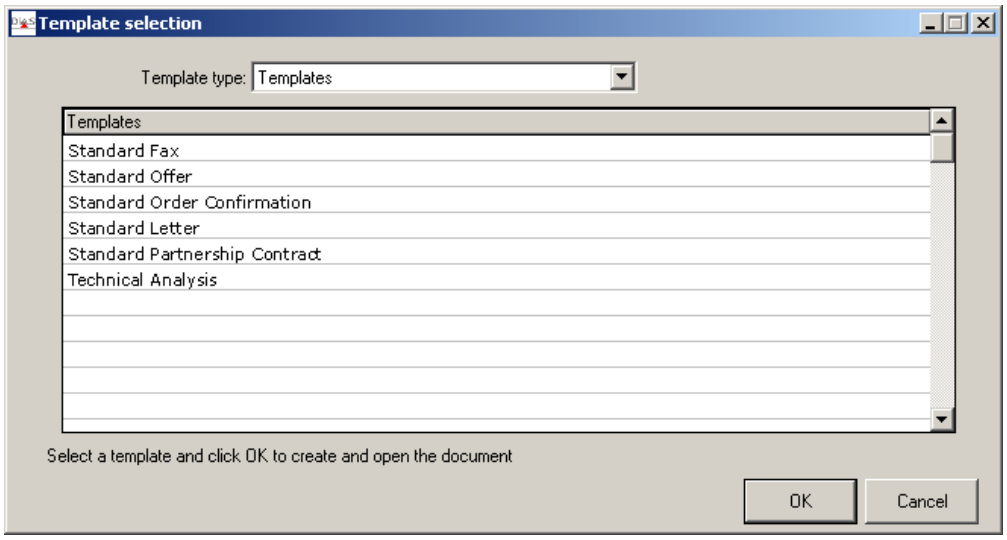
All the templates that you currently use can be integrated in DIAS. That way you can easily create new documents. The address information of the customer, supplier, etc. will be automatically inserted in the template.

20.1. Templates in MS Word

- Open MS Word to open a template
- Click in the DIAS toolbar on Select a DIAS template
  If you do not see the DIAS toolbar: View → Toolbars → DIAS Tools


Document1 - Microsoft Word
File Edit View Insert Format Tools Table Window Help
Normal 12
DIAS toolbar
Select a DIAS template
Draw AutoShapes
Page 1 Sec 1 1/1 At 2.4 cm Ln 1 Col 1 REC TRK EXT OVR

- The window Template selection will appear. Select the template and click OK or double click.



Fetch address data

In the template you can refer to addresses saved in the DIAS address book using field forms.

- Click in the DIAS toolbar on Fetch address data from DIAS
- The DIAS address book will open and you can select the address.
- Double click on the address you wish to integrate in your template. The address information will be automatically inserted in the form fields (for more information: Creating form fields on page 104).

Fetch DIAS document ID

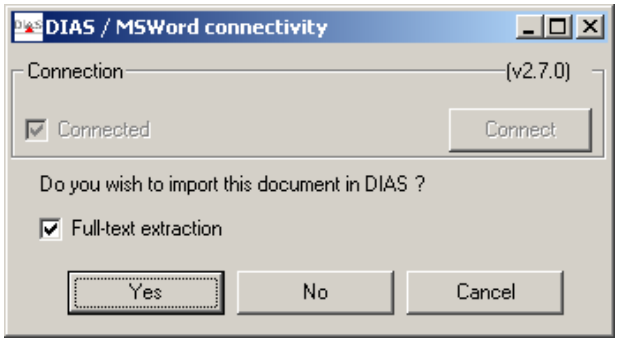
In a MS Word template you can refer to a document that is archived in DIAS.

- Place the cursor where you wish to place the DIAS document ID.
- Click in the DIAS toolbar on Fetch DIAS document-ID
- The archive will open and you can search the document you wish to refer to.
- Double click on the document in question and the document-ID will be inserted in you Word template, ex. **UITOFF3489** (this should not necessarily be a MS Word document)
- Afterwards you (or other users) can easily consult this document by selecting the document-ID and clicking on Show this document from DIAS .

Submit to DIAS

To insert your newly created document in DIAS:

- Click on Submit to DIAS in the DIAS toolbar.
- The window DIAS/Office connectivity will appear:



  - Full-text extraction: the textual contents of the document will be completely integrated in the database allowing to make full-text searches afterwards.
  - Connect: if there is no connection with the Localserver, click on Connect to (re)establish the connection.

- The window Add file to the archive will appear (More information: Import files in DIAS on page 31)

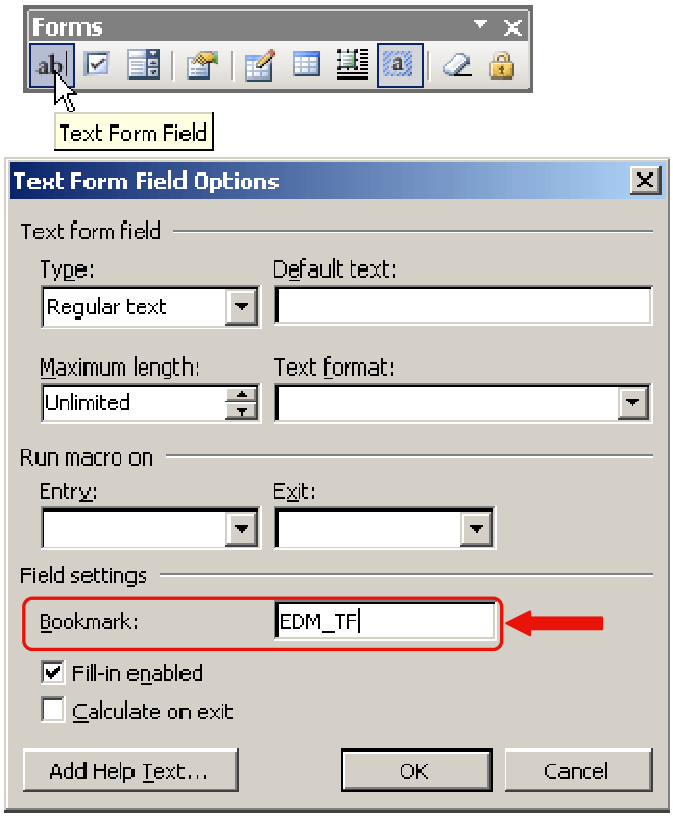
Attention!

Each template is a read-only document and can not be modified. You always get a copy of the document.

Creating form fields

In order to integrate data (ex. address, name, city, telephone, etc.) from DIAS in your template, you first have to create form fields. The data will be automatically inserted in the fields when importing the document in DIAS.

- Move the cursor to the place where you wish to insert a form field.
- Click in the Forms toolbar on Text Form Field
- The form field will appear in your document
- Double click on the form field to op the Text Form Field Options.



- Fill in the Bookmark.

List of bookmarks:

DIAS_ID	Identification of the DIAS document; example: UITOFF3489 (only possible when the document is imported in DIAS)
DIAS_NAME	Name of the head address (Title - space - last name - space - first name)
DIAS_TITLENAME	Title of the head address
DIAS_LASTNAME	Last name of the head address
DIAS_FIRSTNAME	First name of the head address
DIAS_ATTN	Name of the sub address (Title - space - last name - space - first name)
DIAS_TITLEATTN	Title of the sub address
DIAS_FIRSTATTN	First name of the sub address

DIAS_LASTATTN	Last name of the sub address
DIAS_ADDRESSLN1	Address line 1 (professional)
DIAS_PR_ADDRESSLN1	Address line 1 (private)
DIAS_ADDRESSLN2	Address line 2 (professional)
DIAS_PR_ADDRESSLN2	Address line 2 (private)
DIAS_COUNTRY	Country code (professional)
DIAS_PR_COUNTRY	Country code (private)
DIAS_CITY	City (zip code - space - city) (professional)
DIAS_PR_CITY	City (zip code - space - city) (private)
DIAS_TEL	Telephone number
DIAS_FAX	Fax number
DIAS_FROM	Name of the user who imported the document (only possible when the document is imported in DIAS)
DIAS_DATE	Date on which the document was imported in DIAS
DIAS_FCT	Function of the sub address (contact person)
DIAS_EML	E-mail address of the head address
DIAS_VERSION	Document version number (Version Management)
DIAS_VERSIONDATE	Date of the selected version
DIAS_DOCTYPE	Document type
DIAS_DOCDATE	Document date
DIAS_TYPEUDP	Add the primary UDP (corresponds with the document type sub menus in the archive structure)
DIAS_UDP_<TYPE>	Add a UDP (other then the primary). Define between the brackets the type of the UDP you wish to insert.
DIAS_DOCDESCR	Description (title) of the document
DIAS_DOCSTAT	Status of the document
DIAS_REP	Representative linked to the address
DIAS_VAT	VAT number (if the sub address has a VAT number this will have priority over the main address)
DIAS_SEX	Sex of the contact person
DIAS_DOSDESCR	Description of the administrative file / dossier
DIAS_VT	ID of a virtual record
DIAS_VT_TABEL_LABEL	Name of the virtual table
DIAS_VT_RECORD_DESCR	Name of the record (as described in the field “description”)
DIAS_VT_EXT_VAR1	Insert the first title field of the virtual table
DIAS_VT_EXT_VAR2	Insert the second title field of the virtual table
DIAS_VT_EXT_VAR3	Insert the third title field of the virtual table
DIAS_VT_<FIELDNAME>	Insert a field of the virtual table. Define between brackets the type of field you wish to insert.

Attention!

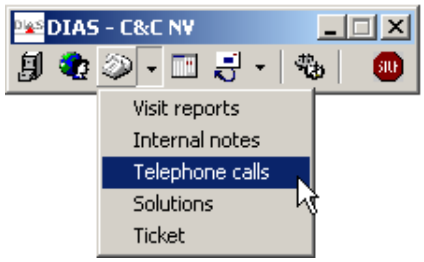
Each template is a read-only document and can not be modified. You always get a copy of the document.

21. Follow-up

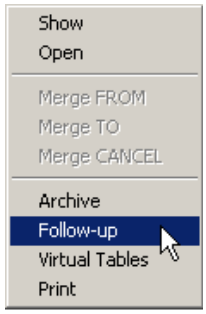
With DIAS you can register telephone calls, visit reports or internal notes and take care of the necessary follow-up.

21.1. Register a telephone call, visit report or internal note

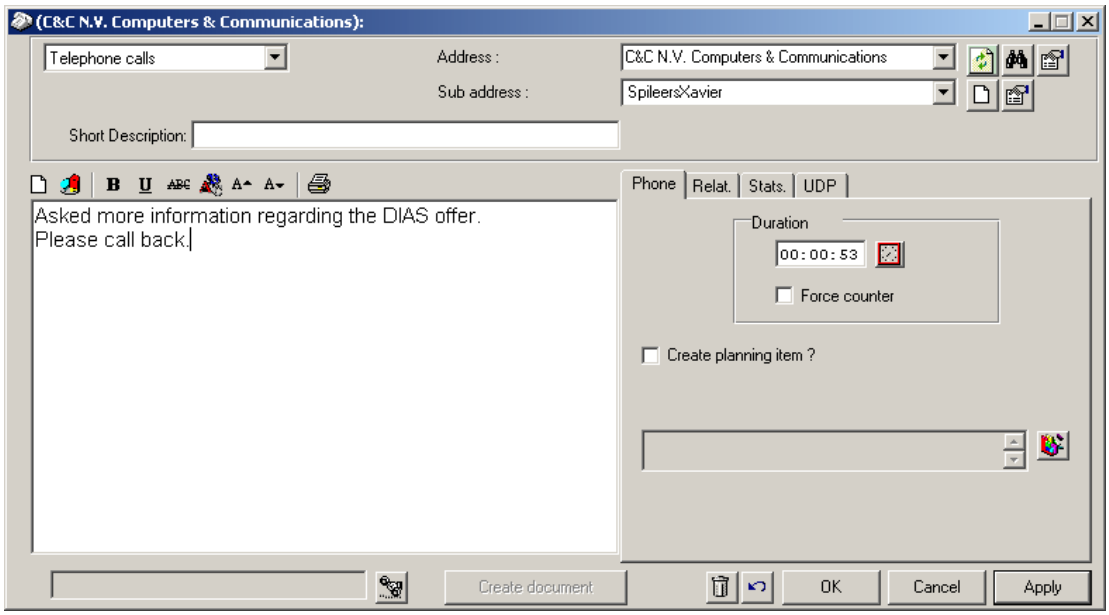
- Click in the DIAS Start menu on Telephone calls.



OR select the company or contact person in the address book, click right and select Follow-up.

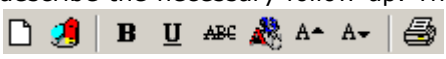


- The window Telephone call will appear:



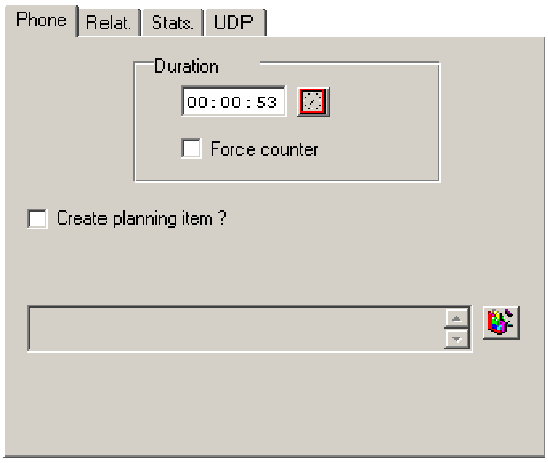
- In the upper left menu you can define the document type:

- Telephone call
- Internal note
- Visit report

- Fill in the address and sub address (if necessary) of your contact person. Remark: when opening the Follow-up window from the address book, this information will be completed automatically.
- In the text field you summarize the contents and describe the necessary follow-up. The lay-out of the text can be modified with the special toolbar: 

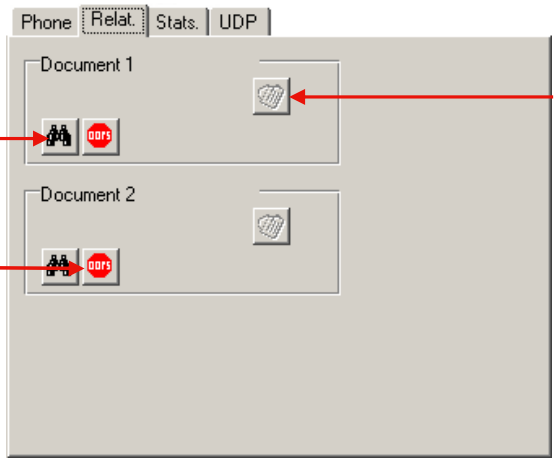
- In the right window you can add additional information regarding your document:

  - Tab: *Phone*



On this tab the Duration of your telephone call is automatically registered.
With the option "Create planning item" you can register the telephone call in your DIAS agenda (More information in the section "Agenda" on page 114)

  - Tab: *Relation*



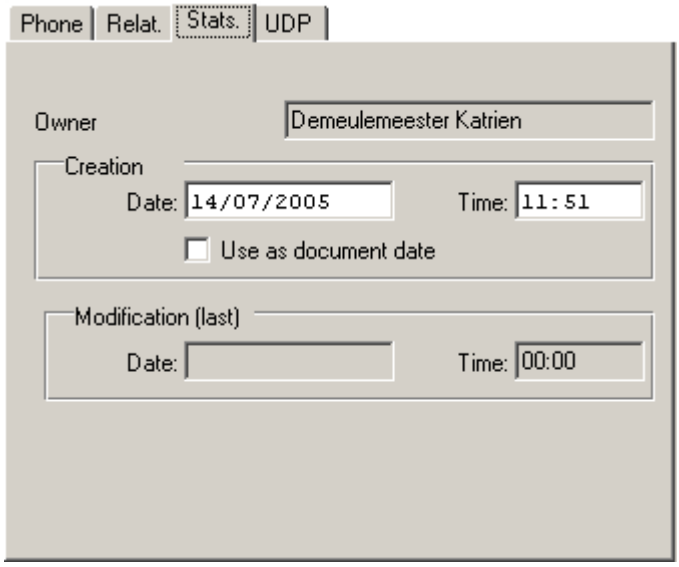
Search the document you wish to relate

Remove the related document

Show the document

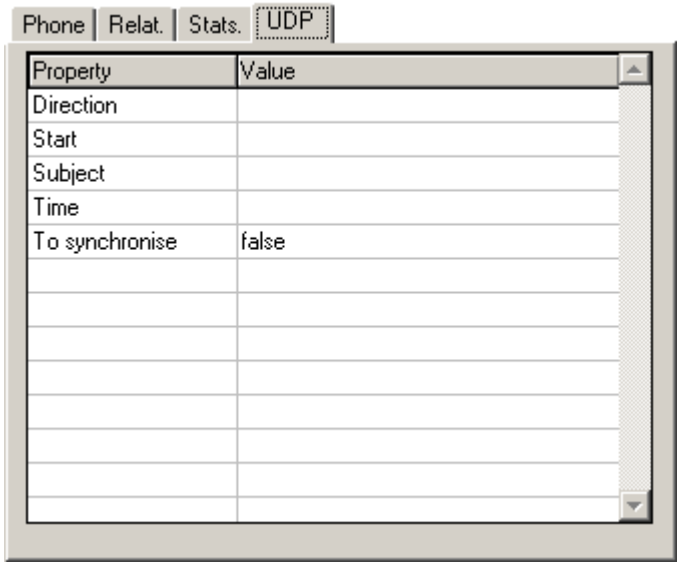
Here you can relate other DIAS documents to your telephone call; usually documents necessary for the follow-up (fax, invoice, etc.).

  - Tab: *Status*



On this tab you can see the document Owner and the exact creation date and time of the document. When the document has been modified you will also see the date and time of the last modification.

- Tab: *UDP*



With the UDP's (Unique Defined Properties) you can manually add other useful information to your document. The UDP's can also be used as search criteria in the DIAS database.

21.2. Integration in DIAS

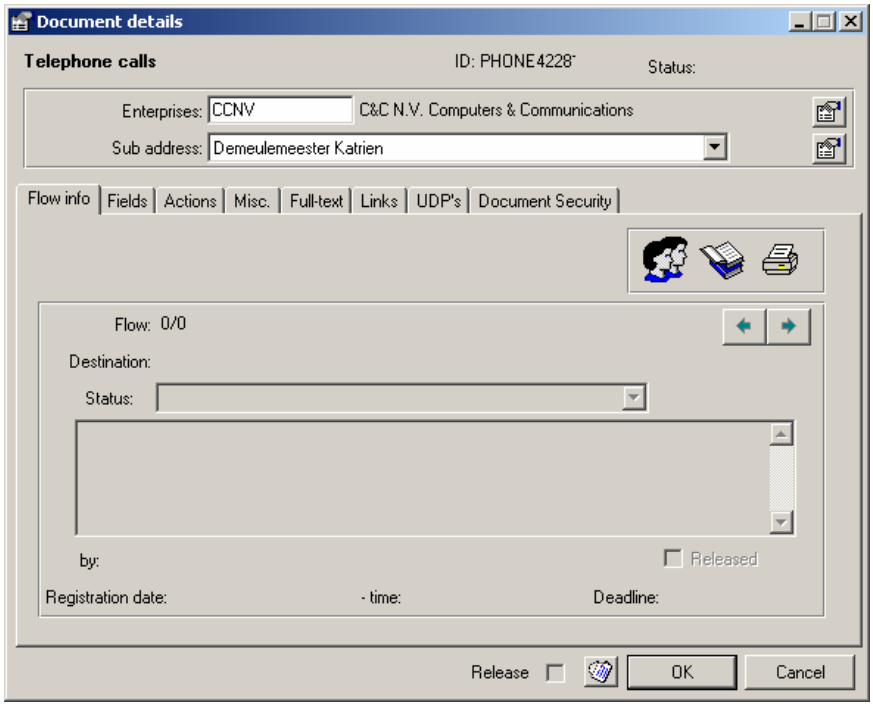
After filling in the necessary information, you can import the document in DIAS.

- Click OK if you wish to save the document in your workflow. Remark: the document will not be integrated in the DIAS archive! If you wish to modify the document afterwards you double click on it in your workflow.

Document type
Add...
Status
Ow...
Dat...
V
R...
F
Description
Visit reports W.... GEZ 14... demo dias + bespreking
Incoming cor... C&... IN 29... This is a test document
Random docu... DIC... GEZIEN GE... 28/... New version VRS 4.0 PPT
Marketing C&... INBEH DR... 13/... Enquête overzicht Belgisch
Marketing C&... DRAFT 15... Manual DIAS (EN)
Telephone c... C&... 14... Asked more information

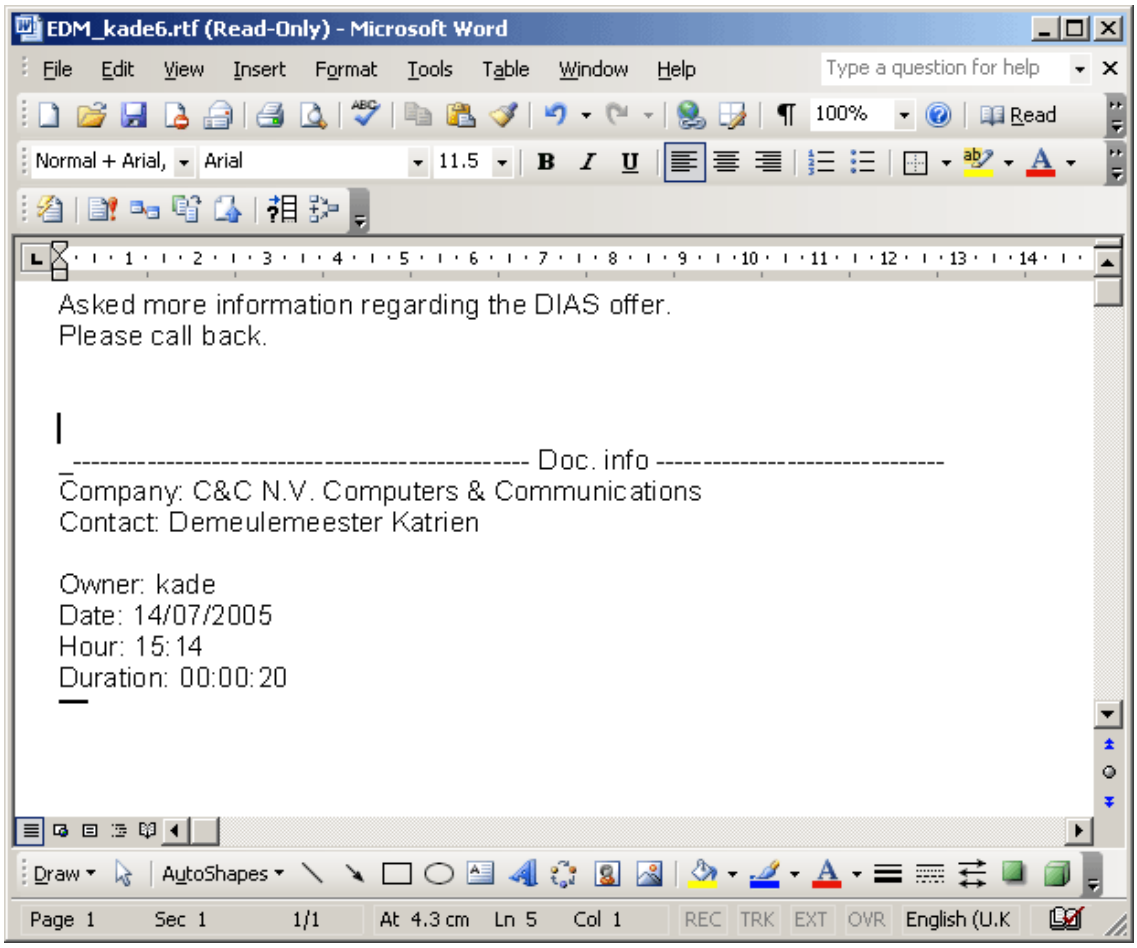
- Click Create document if you wish to integrate the document in the DIAS archive. (If you don't want to send the document to your workflow, first click Apply instead of OK)

- The Document details window will appear:



You can immediately add a flow the document or carry out another action. You can also just click OK to complete the integration of your document.

- When opening the document afterwards, the text (including other useful information regarding the document) will be placed in a MS Word document:

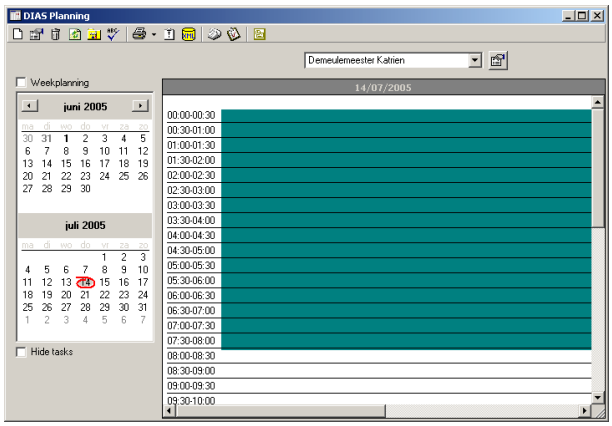

EDM_kade6.rtf (Read-Only) - Microsoft Word
File Edit View Insert Format Tools Table Window Help
Type a question for help
Normal + Arial, Arial 11.5
Asked more information regarding the DIAS offer.
Please call back.
---------- Doc. info ----------
Company: C&C N.V. Computers & Communications
Contact: Demeulemeester Katrien
Owner: kade
Date: 14/07/2005
Hour: 15:14
Duration: 00:00:20
Draw AutoShapes
Page 1 Sec 1 1/1 At 4.3 cm Ln 5 Col 1 REC TRK EXT OVR English (U.K

22. Agenda

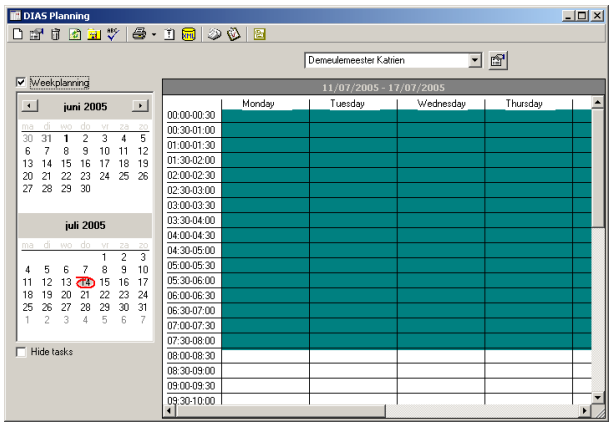
With the agenda module in DIAS you can plan appointments, meetings and other tasks.

- Click in the DIAS start menu on Planning:

22.1. The agenda window



Day planning



Week planning

- In the left part of the window you see the date navigator: standard DIAS shows 2 months.
- The appointments and / or tasks are divided in intervals of 30 minutes.
- The green part indicates the inactive part of the day, the white part the active hours.
- In the upper left corner you can select week planning (Monday - Sunday).

22.2. Create a new agenda registration

- Click on Create a new registration

OR

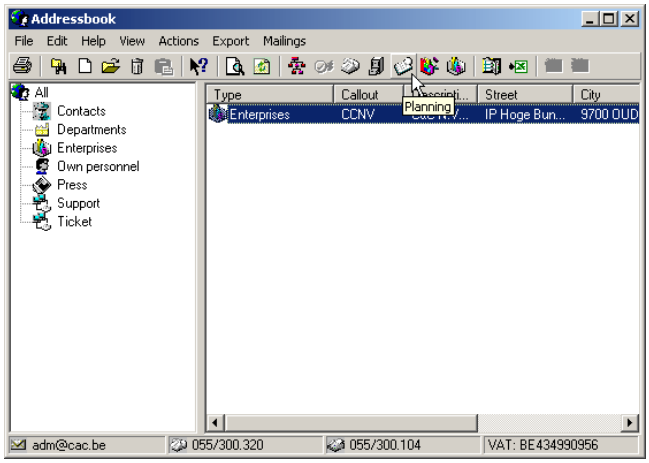
- Double click in the timetable of your agenda

OR

- Click right in the timetable and choose New

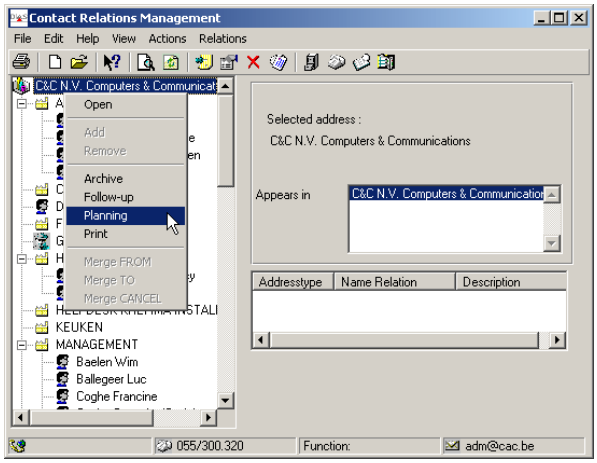
OR

- You can also create a new agenda registration in the address book. For example: if you wish to make an appointment with one of your customers, select the customer and then choose Planning in the toolbar.



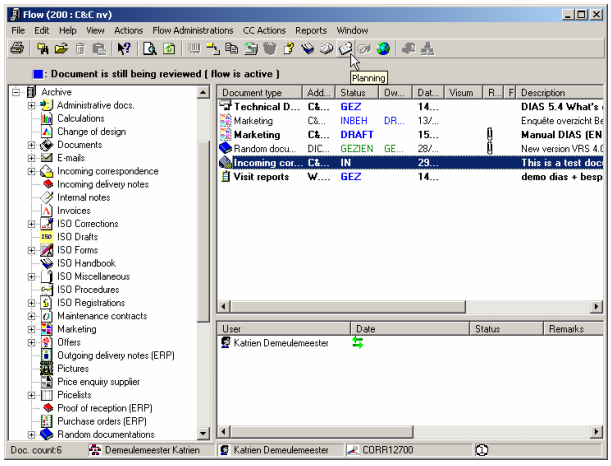
OR

- Select the company or contact person in the CRM window, click right and choose Planning or click in the toolbar on the planning icon .



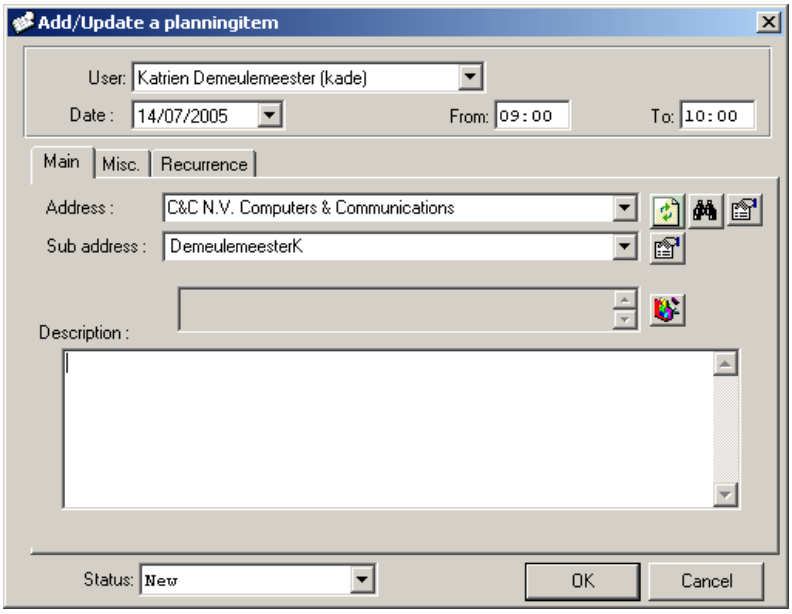
OR

- Click in the archive or workflow window on the planning icon .

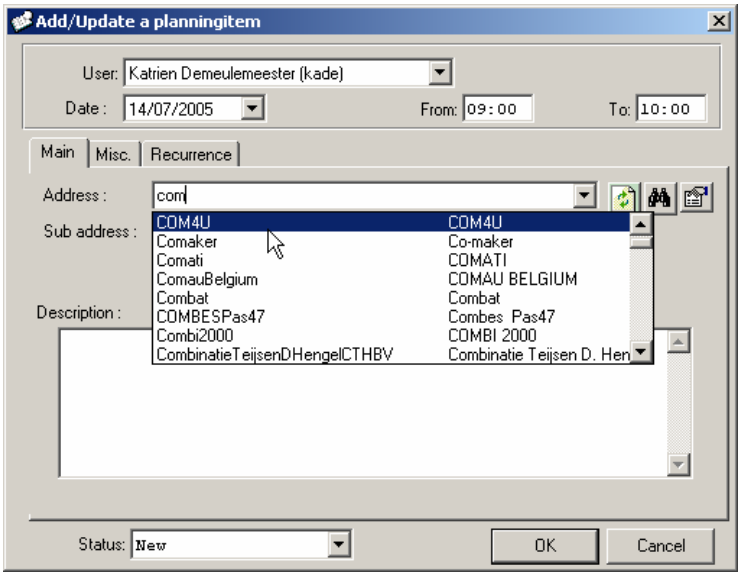


- The window Add / Update a planning item will appear:

Tab Main

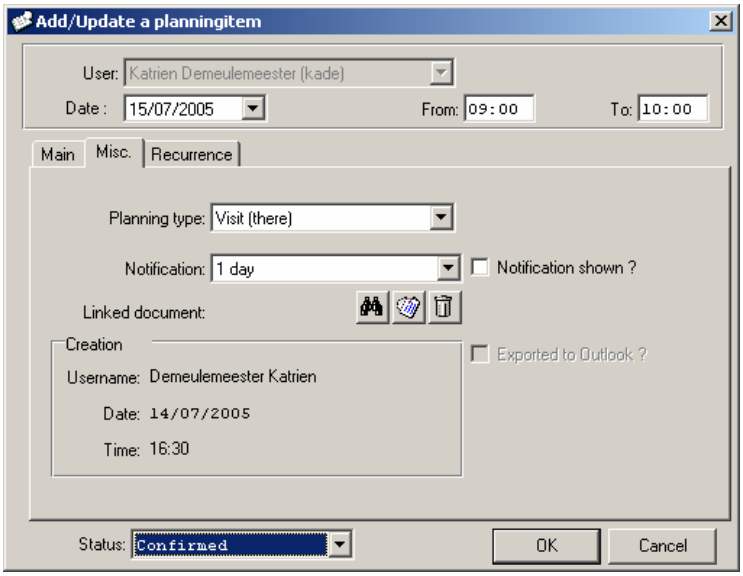


- You have to fill in the date, start and ending time and give a description to the new registration. On the next two tabs you can also fill-in more information regarding your agenda item (see next page).
- When using one of the last three methods to create an agenda registration (see page 112) the address and sub address fields will be completed automatically. Otherwise you have to:
  - Click on and look up the address in the address book.
  - Type the name of the addressee in the field. If you only enter the first letters of the address you can select the address in the drop down list.



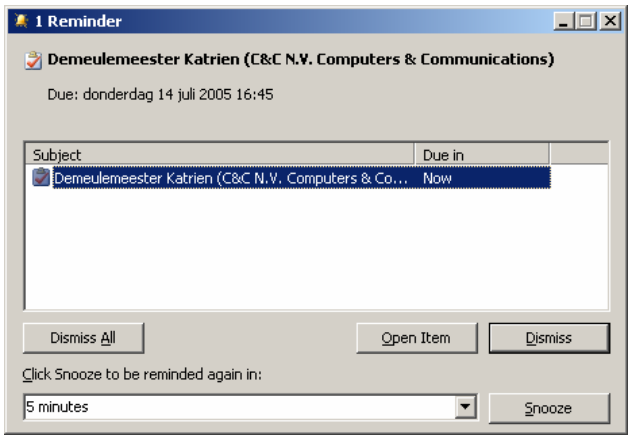
  - Click to refresh the combo list.
  - Click on to see the address details.

Tab Miscellaneous

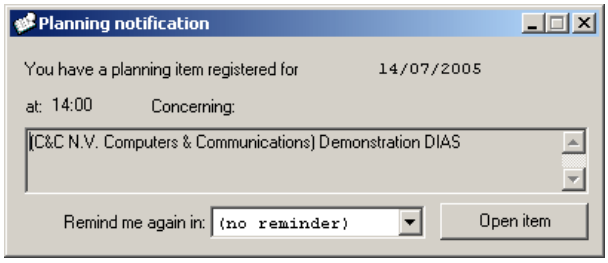


- Select the correct Planning type: telephone call, contact, reminder, vacation, etc.
  The planning types Reminder and Contact are immediately considered tasks.
  In the Preference window (click) you can determine your standard planning type.
- In the field Notification you can choose to get a reminder of your appointment or task. When you check the box "Notification shown?" the reminder will no longer pop up on your screen (it is best to leave this option unchecked)!

Reminder:



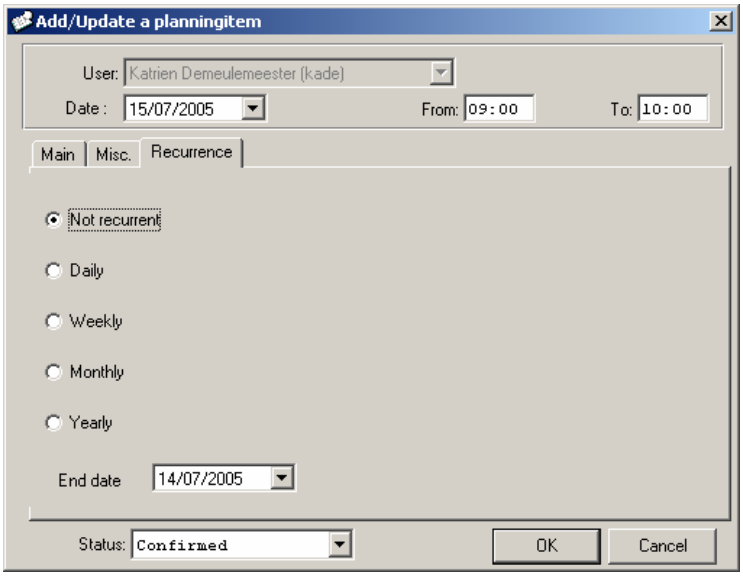
Reminder when your DIAS agenda is synchronised with MS Outlook



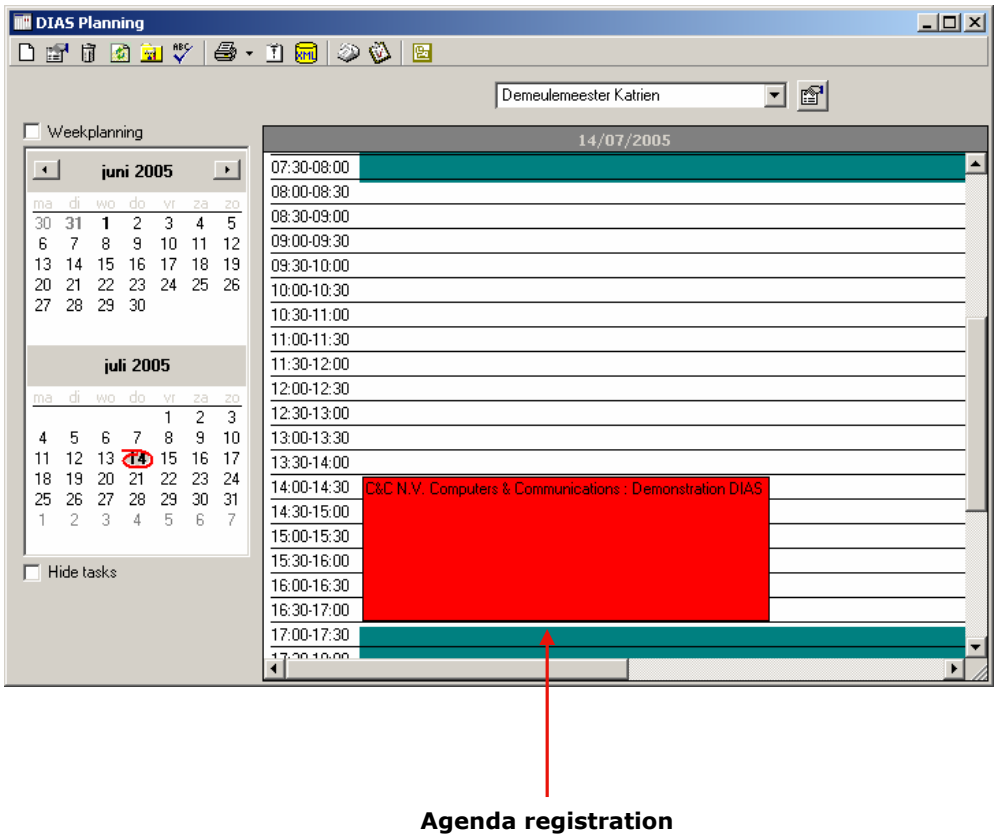
DIAS reminder

- With the option Linked document you can relate a document to your agenda item:
  - Search the document you wish to relate to your agenda registration
  - Show the related document
  - Remove the related document
- Exported to MS Outlook: the new item will be exported to your MS Outlook agenda.

Tab Recurrence



- If your appointment or task has a repetitive character, you can define here how often and for how long the agenda item should recur.

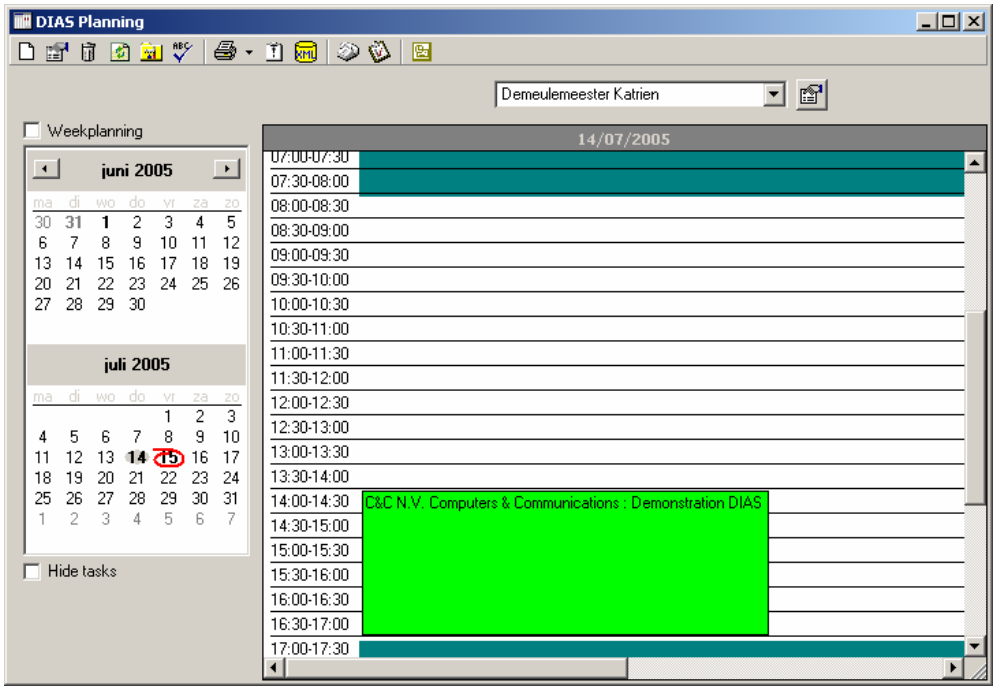


22.3. Modify, remove or complete an agenda registration

- **Modify**:
  Click right on the agenda item in the time schedule and choose Edit.
  OR
  Double click on the agenda item.
  OR
  Click on Modify a registration in the toolbar.

- **Remove**:
  Click right on the agenda item in the time schedule and choose Delete.
  OR
  Click on Delete a registration in the toolbar.

- **Complete**:
  Click right on the agenda item in the time schedule and choose Complete.
  OR
  Click on Set this item as "completed"
  OR
  Open the agenda item and change the status on the first tab to Completed.
  → An appointment can be completed when for example you wrote a visit report. When you change the status to completed, the appointment or task will be coloured green instead of red.

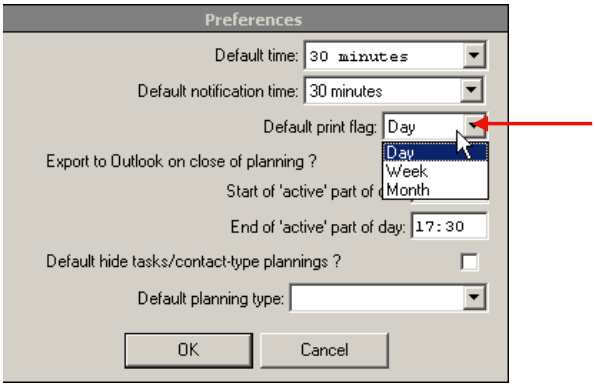


22.4. Print reports

- To print a day, week or month report, click on Print report:

Planning (DIAS) - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address C:\Documents and Settings\kade\Local Settings\Temp\EDM_kade_plan.html
Go Links
Planning (DIAS)
User: Demeulemeester Katrien
Date : 14/07/05
14:00 -> 17:00 C&C N.V. Computers & Communications Demeulemeester Katrien
Type : Gathering (here)
Tel: 055/300.320 Tel: 0477 24 95 08
Address: IP Hoge Bunders Ambachtstraat 8
9700 OUDENAARDE
Subject : Demonstration DIAS
Done
My Computer

- To print a report of all the tasks and appointments that have not been completed, click on Print a report of not-completed planning items .
- In the window Preferences you can modify the standard print settings



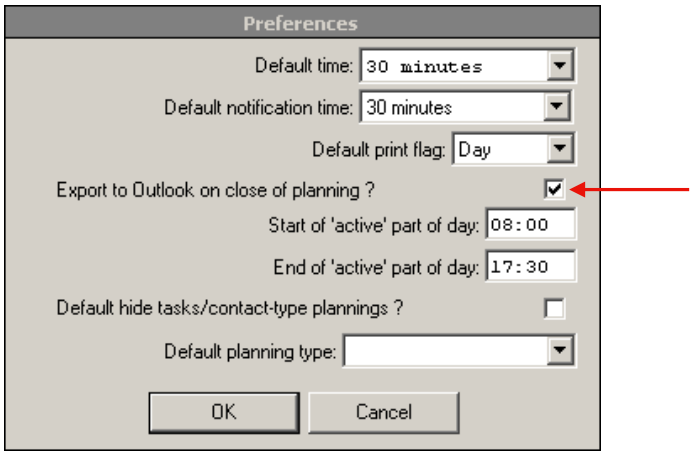
22.5. Export to Outlook

To export the agenda registrations to MS Outlook, click on Export to Outlook . All the registrations will then be copied to your MS Outlook agenda.

Attention!

All your agenda items with planning type Contact, Telephone and Reminder will be exported to your list of tasks in MS Outlook.

You can also choose to automatically export your DIAS agenda to MS Outlook when closing your planning. Open the preferences and select Export to Outlook on close of planning?.


Preferences
Default time: 30 minutes
Default notification time: 30 minutes
Default print flag: Day
Export to Outlook on close of planning ?
Start of 'active' part of day: 08:00
End of 'active' part of day: 17:30
Default hide tasks/contact-type plannings ?
Default planning type:
OK
Cancel